



**PHILANTHROPIC ADVISOR
SOBRATO PHILANTHROPIES**

Mountain View, CA

September 2019

Overview

[Sobrato Philanthropies](#) is seeking an experienced Philanthropic Advisor for this newly created role. The Philanthropic Advisor (PA) will have the unique opportunity to work strategically with members of this multi-generational family to grow and enhance the family's collective, collaborative, and individual philanthropic impact.

Four generations of Sobratos have lived and worked in Silicon Valley and know that, while they have significantly benefited from the region's growth, too many residents have not had full access to opportunities for improving their quality of life. Sobrato Philanthropies comprises the Sobrato family's collective, collaborative, and individual giving through its business, foundation, and other philanthropic vehicles. The Sobrato family applies the same values of leadership, integrity, innovation, service, and stewardship across all of their philanthropic and business activities, working to leverage the combined power of their investments to create opportunity in their local community and beyond.

To date, the Sobrato family has given away more than \$550M. Beyond such financial contributions, three generations of Sobratos currently serve the community by actively investing their time and energy as business and non-profit leaders, board members and volunteers, and social entrepreneurs. As the family's and organization's assets increase and in keeping with The Giving Pledge, the family's vision for Sobrato Philanthropies is to further leverage family, corporate, and philanthropic assets for greater impact and to provide leadership and support to the causes they care most about.

Sobrato Philanthropies is a small, intimate environment where culture fit, shared values and perspective are very important. The ideal candidate should be: 1) an experienced philanthropic advisor with prior experience working directly with high net worth individuals; 2) a generalist with broad knowledge of the non-profit and philanthropic sectors; 3) a superb project manager and quick study with excellent skills in strategy, planning, execution/implementation, writing and communications; and 4) a down-to-earth, adaptable, trustworthy individual with exceptional people skills and emotional intelligence.

The PA will: 1) partner closely with family members in the pursuit of their philanthropic passions individually and in collaboration with each other; 2) facilitate communication and collaboration among family members about their philanthropic and community engagements; 3) serve as a thought partner and advisor to family members by helping them to access resources needed to increase their philanthropic activity and realize their impact goals.

Specific responsibilities include:

- Collaborative Strategy. Work closely with family members to identify areas of philanthropic interest for grantmaking and impact investing activities. Use an asset-based approach to elicit the best in family members, understanding what each family member has to contribute and engaging them in their areas of strength and passion. Make connections between family members to identify opportunities for family collaboration across interest areas.
- Thought Partner. Serve as a thought partner and resource to guide family members in the most effective ways to pursue their philanthropic goals. Initiate and respond to requests for relevant research and insight and support the family in identifying the best resources (i.e., experts, consultants, education opportunities) to fulfill their needs and increase their ability to engage and expand their philanthropic activity over time.
- Project Management. Research and manage family members' philanthropic projects upon request. Coordinate family-wide projects or initiatives as they arise. Develop a process for individual family members to co-fund in order to further amplify impact across their giving. Determine the need for outside consultants and other resources, and also determine the most effective and efficient way to manage specific initiatives or projects.
- Communications. Foster increased communication and dialogue among family members about their philanthropic activities and interests.
- Family Engagement. Identify ways to ensure all family members are engaged in the family's philanthropy in ways that are most meaningful to each individual. Ensure successful planning and execution of key family philanthropy meetings including agenda development, coordination and oversight of advance material preparation, coordination with the support staff of meeting logistics and follow-up.
- External Relationship-building and Partnerships. Invest in relationships with non-profits in relevant philanthropic areas of interest. Identify new, emerging and innovative organizations doing groundbreaking work in areas of interest to the family and help facilitate connections as appropriate. In addition, build relationships with high quality advisory resources in the philanthropic space to ensure adequate expertise and support for the wide range of family giving activities.

- Emerging Issues and Trends. Track and stay current on emerging issues and trends in the family's areas of interest.

Qualifications

- Seven plus years of experience as a funder or guiding funders/donors.
- Mission-oriented with a proven commitment to social impact.
- Prior experience working with high net worth individuals and families.
- Experience in the nonprofit and philanthropic sector and knowledge of different types of philanthropic vehicles. Experience in impact investing strongly preferred.
- Substantive experience working on domestic and international grantmaking and partnerships.
- Experience in strategy development, planning and analysis. Ability to prioritize, organize, execute and manage multiple competing assignments and responsibilities. Consulting or advising background preferred.
- Social sector knowledge, including strategy, theory of change, program design, evaluation/performance management, business models, capacity-building, etc.
- Excellent customer service and communication skills (listening, interpersonal, verbal, and written); responsive, thoughtful and timely.
- Excellent writing, research, synthesizing and presentation skills.
- Strong computer skills and an enthusiasm to learn new tools.
- Willingness to travel as needed domestically and internationally.

Additional Attributes

Successful candidates will also exemplify the following:

- High EQ. Exceptional people skills, with a client-service mindset and a proven ability to work collaboratively with diverse constituents and stakeholders. Open-minded listener and thought partner with high emotional intelligence.
- Inspirational. Someone who is able to help individuals, or groups of family members, imagine new possibilities through their giving and is willing and able to identify human resources and organizations that will be the very best for family members to work with and/or support.
- Flexible and positive. A demonstrated work style that is flexible, humble and adaptable. A positive, can-do attitude where no job is too big or too small. Highly engaged in the work and attentive to every detail.

- Quick learner. Ability to learn and adapt quickly, navigate ambiguity, help drive decision making, and course-correct when needed.
- Collaborative yet independent. Collaborative with experience supporting and leading teams, while also being comfortable working independently and being resourceful and accountable.
- High integrity. Highest ethical standards and personal code of conduct. An impeccable reputation for integrity and judgment; models ethics and trustworthiness in all actions. Personal and professional maturity. Ability to maintain confidentiality, discretion, credibility and trust.
- A sense of humor. Someone who can laugh, creates positive work relationships and finds joy in the work.

Compensation

Salary is competitive and commensurate with background and experience, and a generous benefits package is offered.

To Apply

[Martha Montag Brown & Associates, LLC](#) has been retained for this search. Interested and qualified candidates should apply by sending a cover letter, resume and salary requirements by email to Martha@marthamontagbrown.com. All correspondence will remain confidential.