

INTERVIEW: Leading Strategist
Debra Jacobs, President, The Patterson Foundation, Sarasota

Introduction: Debra Jacobs is a very experienced philanthropist but relatively new to The Patterson Foundation of Sarasota, Florida, having been recently named its President/Chief Executive Officer. As such, she brings a new lens to the job. We caught up with her on the run and grabbed a few of her observations upon taking the reins. Additionally, Ms. Jacobs is the Chair-elect of the Southeastern Council of Foundations. She speaks from this high-altitude view of the field during these uncertain economic times.

TSP: The Patterson Foundation took a big leap in the size of its assets recently due to a bequest. Give us a quick overview of the organization and how you decided to organize it. (delete- to fit the needs of Sarasota.) As you proceeded, what was the first thing you did as the new incoming President?

Debra: The Patterson Foundation (TPF) was created in 1997 with a corpus of approximately \$2 million and will increase to over \$170 million in 2009 due to a bequest from Mrs. Patterson resulting from her death in 2007. Until 2009, TPF did not even have a pencil, much less office space or a computer. In addition to setting up shop, we are establishing business practices, aligned with standards of excellence in the institutional philanthropic realm. TPF is unique in that it has an “open-ended charter”, so we are on an intensive course of discernment to determine the appropriate focus for impact. We have been on exploratory visits to a wide variety of foundations, in addition to learning from organizations such as Grantmakers for Effective Organizations and the Center for Effective Philanthropy. Thanks to our membership in the Southeastern Council of Foundations, we have had access to the brightest minds and best practices in the field.

TSP: You have been the leader of successful teams before. Now you are building from the ground up. What do you want your new team to look like in a year or two?

Debra: As TPF determines its funding focus, we know that we need to hire highly capable staff to carry out the mission. Because we will evolve as an organization, we will hire strategically with an eye to the long term.

Our general philosophy is to hire fewer staff, and to use consultants and strategic partners more. For example, we have completed a Request for Proposals for our Strategic Communications partner. By outsourcing this responsibility, we will have a team of multi-talented professionals assisting us with our positioning to ensure that those who need to know and want to know about us will have that ability in a responsive and efficient way.

TSP: How has the community of Sarasota responded to your move over to The Patterson Foundation?

Debra: When we announced that I was leaving the William G. Selby and Marie Selby Foundation six months prior to my start at TPF, the purpose was to provide ample time for the Selby Foundation to hire my successor, allowing for a seamless transition. The community appreciated this approach and the excitement about the potential of TPF has been immense. The flood of interest in being hired, investing the funds and providing ideas for funding has been continuous. We know that we will not be the “aspirin for everyone’s headache nor the vitamin for everyone’s booster,” but we will strive to be thoughtful stewards to gain a bigger impact.

TSP: During your philanthropic work experiences before coming to The Patterson Foundation, tell us about a time when your approach to a problem helped underscore why strategic philanthropy pays big dividends.

Debra: Foundations interested in being more than a “Nonprofit ATM” must practice strategic philanthropy, otherwise, everyone’s crisis of the moment or latest great idea could cause funds to be spread thinner than peanut butter. Selby Foundation has always supported education and our local school district, which serves over 40,000 students has been a beneficiary of our strategic funding. While there is never a shortage of need within the District, our goal was long term systemic change. We tackled this in two ways. In a collaboration with two other funders, we created the Education Partnership which provided technical assistance to the Superintendent on up to two major systemic opportunities. So instead of funding hundreds of smaller, “nice” grants, the funders were able to invest their funds to reposition the “Queen Mary” instead of just re-arranging the deck chairs. Selby Foundation was also interested in science education, most particularly bringing hands-on science to the classroom. When the Superintendent suggested establishing and equipping science labs, we were intrigued, but due to decentralized decision-making, each school had the authority to decide with no collaborative decision-making or efficiencies. We conditioned our grant on the district bringing together the science educators to create a “common” science lab for elementary, middle and high schools, so the transient student population and the teachers moving from school to school would find the same lab wherever they were. Not to mention the volume discounts and saving on construction drawings. This all happened because the Selby Foundation embraced a strategic focus of systemic change with measurable impact.

TSP: You have a great history of engagement with and support for the Southeastern Council of Foundations (SECF). As you step into the role of the Chair in January you will be arriving in the midst of one of our nation’s most challenging economic calamities. How do you feel foundations and donors should be responding and what role do you see the SECF playing?

Debra: When I entered the foundation world in 1998, my first professional exposure for learning and networking was the Annual Meeting of the Southeastern Council of Foundations (SECF). The impact of those two days was so great, I can still recall speakers, messages and who I met at the various functions. The value of connecting with professionals in our field has reaped dividends time and time again. I have called

upon my colleagues to share policies, procedures and position descriptions. We have attended each others meetings, bringing expertise to each other that greatly benefit our boards and staff. SECF connects foundations in eleven states, and while each state has its unique challenges, we each can learn from what works or doesn't as we tackle critical issues. During these challenging times, foundations have a responsibility to not only respond to the crisis as hand, but more importantly we must be at the table of creating the new prosperity. SECF connects and convenes those interested in transforming the region, while honoring the distinct missions and approaches of each of the foundations. It is our diversity of funding that advances a dynamic society and it is by sharing our ideas and approaches that each foundation will leverage their impact.

TSP: As you form your goals for the SECF, what are the challenges that the “industry” of philanthropy face and what can foundations do best collectively?

Debra: With the hiring of a new CEO for SECF, timing was perfect to embark on rigorous strategic planning. A committee of board members, general members and staff are evaluating the unique opportunity an eleven-state regional organization will have over the next three years. We focused on the next three years, knowing that the velocity of change will require agility. Because public policy differs by state and the non-profit sector plays a unique role from government and business, foundations need to work together at the state level, but foundations will greatly benefit from the connectivity of information sharing and dialogue that comes from SECF. By serving as the voice of philanthropy in the south, while connecting grantmakers and sharing best practices, more philanthropy will blossom and the region will advance. Foundations have the opportunity to demonstrate standards and practices of excellence that result from learning from the best to do the best.

TSP: It seems like everyone in the foundation world has a different opinion about their role in these difficult times. What can the SECF do to create agreement about our common threats and opportunities?

Debra: The beauty about organized philanthropy in the United States is that each foundation can focus its resources according its charter and vision. To say that one philosophy or a single approach is the cure, discounts the strength of diversity of ideas. SECF has the responsibility to convene thought leaders and those who want to engage, so each can learn, evaluate and act to leverage their resources for impact. The opportunity that must occur is to use our resources with thoughtful stewardship and change. SECF has the responsibility to be sure its members and the field have access to ideas and opportunities.

TSP: As a leader within an organization, you must often build support for goals and projects from people or nonprofits over which you have no direct authority. The “golden rule” always applies, but is that the best way to get things done?

Debra: While indeed we must treat others as we wish to be treated, intrinsic to making a difference requires being at the table, being prepared and participating. People don't care how much you know, until they know how much you care. By taking an interest in the person, the organization, the cause, a foundation leader builds trust and provides value, often times much more money in the form of a grant check.

TSP: What are the three most important values of the SECF? Tell us a story that demonstrates one of these values in practice.

Value of partnerships and collaborations

Value of diversity of experiences, ideas and opinions

Value of integrity and honesty

Debra: Each of the eleven states has a variety of foundation-gathering networks, varying from the North Carolina Network of Grantmakers to the Florida Philanthropic Network. Foundations in each state can formally join an association or periodically partake of the offerings. SECF has reached out to each state in a dialogue of cooperation with the understanding that each state has varying levels of mission, programming and critical mass. By embracing the reality that each state will be different, and that foundations have limited time and resources, SECF will not only add value by sharing in unique ways, it can stretch resources effectively.