

**Profile**

Steve

First Name

Ortiz

Last Name

sortiz@unitedwaysb.org

Email Address

Street Address

Suite or Apt

Goleta

City

CA

State

93117

Postal Code

**Indicate Supervisor Who Will Receive a Copy of your Application \***

First District - Das Williams

Primary Phone

Business: (805) 882-0506

Alternate Phone

**Which Boards would you like to apply for?**

FIRST 5, CHILDREN AND FAMILIES COMMISSION: Submitted

John Hanna

Reference 1 Name

1276 Camino Palomera, Santa  
Barbara, CA 93111

Reference 1 Address

805.964.9105

Reference 1 Telephone

Retired Business Executive

Reference 1 Occupation

Terri Maus-Nisich

Reference 2 Name

105 E. Anapamu Street, Santa  
Barbara, CA 93101

Reference 2 Address

805.568.3412

Reference 2 Telephone

Assistant CEO - County of SB

Reference 2 Occupation

---

Leo Hamill

Reference 3 Name

1205 Coast Village Road, Santa  
Barbara, CA 93108

Reference 3 Address

805.981.2772

Reference 3 Telephone

Wealth Management

Reference 3 Occupation

---

**If you are now, or have ever been employed by the County of Santa Barbara, please list the department in which you worked, your title, and the dates you were employed.**

N/A

---

### Interests & Experiences

**Please explain why you are interested in serving, and what experience you bring to the Committee. Attach additional documentation as necessary.**

---

As a parent of a 4-year old daughter and a 1-year old son, I see the significance of being a role model on a daily basis. Every moment with my children is an opportunity for them to learn and also gain the emotional support that will help them succeed in the future. My wife and I feel privileged to have had access to complete higher education and the resources needed currently to give our children the best opportunity to thrive in their first 5 years and subsequently k-12, college and career. However, through my professional career and community involvement I have seen how lack of access to community programs and resources can prevent children and their families from reaching their potential. Thus, I have chosen a profession that allows me to build community partnerships, strategies and marketing plans that bring some of these resources to the forefront of those who need it most. Through my position, I can influence decisions that improve access to early education, financial stability and health & wellness. I am passionate about the work we do at United Way and First 5, because I am a product of what a community can achieve together. Growing up in a suburb of south Los Angeles I was classified by some as a low income, disadvantaged student. I was not born to a financially affluent family, but their values were affluent. And like many of the local low-resourced children, the care of my parents coupled with the support of teachers, program leaders and community members opened the doors to opportunities that allowed me to thrive. Through my community involvement, I have realized that potential is universal, but opportunity is not. This is why our work is important. Together, using research based, best practice programming, we create local opportunities that maximize every child's potential.

**Give any information explaining qualifications, experience, training, education, volunteer activities, community organization memberships, or personal interests that bear on your application for the above Board, Commission or Committee. Attach additional documentation as necessary.**

Related Experience and Community Service: 1. I'm a parent of two children under the age of 5. The journey continues to be an engaging learning experience. 2. United Way of Santa Barbara County - During my twelve year tenure, I have created, managed and joined community partnerships that support local children and their families. I have also used my business operations and financial background to build and manage organizational and programmatic budgets while mitigating financial risks. Some of the programs I have personally been involved with include: - Kindergarten Success Institutes: the program improves classroom skills for nearly 200 low-income 4-6 year olds who have little or no prior early educational experience. During the 5-6 week session (implemented before/after school and during the summer at 10 local sites), United Way and its partners provide best practice and research-based curriculum and credentialed teachers to help students master the social/emotional, language, motor and approach to learning skills that are essential to their future success in school. - Fun in the Sun: a nationally-recognized summer learning program that provides comprehensive academic and enrichment curriculum, as well as family support services, and social emotional support that reduce summer learning loss and narrow the achievement gap in 300 financially and academically at-risk children (grades 3-12) and their families at five sites (Carpinteria, Santa Barbara-Eastside, Santa Barbara-Westside, Goleta, and Santa Ynez). FITS presents an integrated series of educational, relational, and recreational activities to strengthen skills that would otherwise languish and give children the necessary tools to produce long-term behavioral and academic improvements. - United for Literacy: 7,000 students at 30 schools (grades K-12) have access to individualized, online reading enhancement programs that improve their literacy skills and boost their motivation to pursue higher education and a career. 3. United Boys and Girls Club: Past Board, Fundraising, Finance and Marketing Committee Member

S.Ortiz Resume FFSCB-  
2017.pdf

Upload a Resume

Please attach any additional documents here

---

## Demographics

### Ethnicity

Hispanic

### Gender

Male

09/02/1982

Date of Birth

**Education Completed:**

---

Bachelors Degree and Masters in Business Administration (MBA)

**Please Agree with the Following Statement**

---

**I agree that upon submission of this application all information provided is a matter of public record, and is subject to disclosure.**

---

I Agree \*

# Steve Ortiz

Phone: :

- Email: [sortiz@unitedwaysb.org](mailto:sortiz@unitedwaysb.org)

---

## PROFESSIONAL PROFILE

Seasoned and contemporary professional with extensive management, development, finance, community relations and marketing experience. Mission-focused, dedicated, dependable and self motivated with innovative spirit and strong work ethic. Anticipates needs and manages multiple priorities and people with a proactive, results-oriented approach. Excels in fast-paced environment, both independently and in teams. Employs excellent interpersonal, written and verbal communication skills and a friendly demeanor.

## EDUCATION

MBA, California Lutheran University; Management and Organizational Behavior

**Certification:** CFRE International; Certified Fundraising Executive

BA, University of California, Santa Barbara; Business, Global Studies: Economics and Politics, Spanish

## PROFESSIONAL EXPERIENCE – MOST RELEVANT EXPERIENCE

**President & CEO (2017-Present):** *United Way of Santa Barbara County*

- **Community Impact:** responsible for the overall impact of United Way of Santa Barbara County on the community, with particular emphasis on increasing capacity to drive the impact agenda.
- **Resource Development:** drive key results in fundraising and revenue production; to identify, cultivate and solicit prospective donors and key leaders of prospective new corporate partners.
- **Strategic Management:** serve as the principal resource to the Board of Directors and its key committees and give strong direction in policy formulation and interpretation. Partners with the Board of Directors to craft organizational goals and develops strategies to ensure that they are achieved.
- **Organization Management:** accountable for building and leading high-performing teams, ensuring all teams are aligned and collaborating to achieve organizational results. Maintain accountability for the operational and fiscal integrity of the organization within policies set by the Board of Directors. Works with the Chief Financial Officer to manage organizational spending, monitor budget compliance, and mitigate financial risks.

**Executive Vice President & COO (2015-2017):** *United Way of Santa Barbara County*

- Under the direction of the President & CEO, direct and manage employees, hundreds of volunteers and day-to-day activities of the organization in the Development, Community Impact, Finance & Administration and Marketing departments.
- Participate in and prepare materials and reports for all Board management committees.
- Lead the Strategic Revenue Committee process and manage SRC approved projects.
- Created 2015 Revenue Plan to drive key results in revenue production by identifying, cultivating and soliciting prospective donors and key leaders of prospective new corporate partners.
- Participate in the development of UW's Annual Budget and 3-year Expectations Report
- Oversee operations and budgets of community programs.
- Assist the President & CEO to craft organizational goals and develop strategies to ensure that they are achieved. Focusing on the overall impact of UWSBC on the community, with particular emphasis on increasing capacity to drive the impact.

- Establish and build relationships with top leaders in the community, including those representing the highest levels in business, government, and non-profit sectors.
- Set and guide the strategy for all communications, website, social media, public relations messages and collateral material to consistently articulate UWSBC's mission.
- Represents United Way at trade or community association meetings, and presentations.
- Redesign look and content of UWSBC's Website, Annual Report, E-news and Print Newsletter

**Director of Development & Marketing (2012-2015): United Way of Santa Barbara County**

- Directed all development (workplace, residential, events, fee for service) and marketing activities.
- Developed, implemented and evaluated strategic development, marketing and public relations plans and strategies that helped raise over \$7,500,000 over three years.
- Created monthly report - Annual Campaign Comparison - to track all development revenue broken down by segments (workplace, residential, events, giving levels, \$ and # of donors, etc.).
- Developed strategies for all communications, website, social media, public relations messages and collateral material to consistently and more effectively articulate UWSBC's mission.
- Revamped the look and feel of UWSBC's e-news, Impact Report and Print Newsletters.
- Oversight of Day of Caring, Annual Awards, Red Feather Ball and many other community events.
- Developed, wrote, and edited newsletters, annual report, posters and all marketing materials.
- Represented United Way at trade or community association meetings, and presentations.
- Oversight of national award winning Fun in the Sun program: confirmed partners, vendors, and program participants.

**Managing Partner (2009-2013): FUMO, LLC**

- Owned and operated small business from start-up phase, including developing the business and marketing plan, raising all necessary capital, and completing all legal documents regarding entity structure.
- Handled all business administration, bookkeeping, marketing and business contracts.
- Developed relationships with vendors, brokers, and city and county officials.
- Maintained member relations and billing schedules.
- Sold business interest at slightly over 300% profit margin.

**Director of Workplace Development (2007-2012): United Way of Santa Barbara County**

- Senior manager of development, customer service, community relations, events and marketing activities.
- Developed, implemented and evaluated strategic development, marketing and public relations plans and strategies that helped raise over \$8,200,000 over four years.
- Directed the activities and set performance goals for the development team which raises 78% of United Way's annual revenue.
- Prepared and tracked budgets for multiple departments and community programs.
- Planned and conducted market research to identify opportunities to increase revenue.
- Led Campaign Cabinet and Leadership Circle committees to develop new business.
- Launched United Way's Young Leaders Society.
- Redesigned UWSBC's Website, Launched YLS website.
- Reviewed market analysis to determine customer needs and market strategies.

**Workplace Development Manager (2006-2007): United Way of Santa Barbara County**

- Managed a team of 7 Development Executives.
- Developed, implemented and evaluated strategic development, marketing and public relations plans and strategies that helped raise over \$3,300,000 over two years.

- Led Campaign Cabinet and Leadership Circle committees to develop new business.
- Implemented and evaluated annual resources development plan and marketing materials.
- Assisted in planning and executing development, marketing and public relations meetings.
- Assisted in the development and continually reviewed long-range strategies to maximize organizational performance and build positive relationships with in the community.

**Senior Campaign Executive (2005-2006): United Way of Santa Barbara County**

- Managed 45 accounts with a total value of \$1,500,500. Thirteen accounts were "Top 20" accounts.
- Conducted effective employee campaigns by motivating key business leaders and volunteers.
- Managed hundreds of corporate, major gifts and leadership level donors.

**Financial Manager-Contracts and Purchasing (2002-2005): Devereux Foundation, California**

- **Financial Contract:** Negotiation of all revenue and expense contracts. Prepared all information necessary for annual renewals and price comparisons.
- **Capital Budget:** Along with Finance Director, was responsible of \$6,500,000 yearly budget, allocations, purchases and maintenance.
- **Purchasing:** Controlled and managed all purchase orders. Maintained record of all fixed assets
- **Accounts Receivable and Accounts Payable** Assisted with the oversight of both departments.

**Child/Adult Professional (2000-2002): Devereux Foundation, California.**

- Helped mentally disabled patients; autistic clients and emotionally disturbed patients to advance in their daily life skills. Was one-on-one specialist with aggressive and suicidal clients.
- Served as Staff in Charge (manager) of a full site.
- Medication, First aid and CPR certified.

#### COMMUNITY SERVICE

**Member 2015-present:** First 5 Santa Barbara County, Advisory Board

**Member 2010-2013:** United Boys and Girls Club of Santa Barbara County, Board of Directors

**Founding Staff Member 2009:** UWSBC's Young Leaders Society

**Board Chairman 2009-2012:** Hermanos Unidos National Board

**Board Treasurer 2007-2009:** Hermanos Unidos National Board

**Advisor 2005-2008:** College Link Outreach Program, UCSB Funded Initiative

#### ACHIEVEMENTS

**40 Under 40 Award Recipient, 2010:** Pacific Coast Business Times

Annual recognition of 40 young business leaders in the tri-counties region. Selection based on professional accomplishments, community involvement and outside validation of accomplishments.

**Business Plan - First Prize Award Winner, 2002:** University of California of Santa Barbara, Seventh Annual Business Writing Awards. Cash Prize awarded for excellence in business writing. Award was sponsored by Specialty Merchandise Corporation and the University of California Writing Program.

**US Congress Award 2000:** City of Bell, Los Angeles California.

"In recognition of exemplary performance as a Volunteer worker who has demonstrated outstanding Attitude, Initiative, Work Ethic, Responsibility and a desire to succeed for both yourself and your employer."

#### SPEAKING ENGAGEMENTS

**NEXT: Preparing to Lead 2025 and Beyond, 2016,** County of Santa Barbara's Leadership Congress

**Careers of Service: Helping in a World of Need, 2017,** University of California Santa Barbara