

CBF Foundation

POSITION SPECIFICATION

August 2019

POSITION Foundation President/Chief Legacy Gifts Officer

ORGANIZATION The Cooperative Baptist Fellowship Foundation

LOCATION Decatur, Georgia

WEBSITE CBF.Net/CBFFoundation

POSITION SUMMARY The President/Chief Legacy Gifts Officer (President/CLGO) of the Cooperative Baptist Fellowship Foundation ("CBFF") is responsible for developing and executing the strategic direction, objectives, policies and annual action plans of the CBFF. This is to be done through a collaborative relationship with the CBF Foundation Board of Trustees ("Board") and the leadership of the Cooperative Baptist Fellowship ("CBF"), e.g. CBF Executive Coordinator, CBF Governing Board, CBF Development Staff, etc. S/he is accountable to the Board for the growth and development of endowments, general resources, and legacy gifts for CBF related causes. All to be done while balancing and meeting donor's wishes. In addition, the President/CLGO is responsible for managing the Foundations staff, the investment advisor relationship, and the communications/public relation process for all CBFF activities and with CBF leadership.

The President/CLGO will inherit an organization with a dedicated board and a solid financial position. With the support of a committed Board and the CBF Executive Coordinator, the President/CLGO will lead the evolution of the organization, capitalizing on opportunities to serve CBF Causes and Churches by growing its assets and distributions. At the same time, the President/CLGO will maintain a focus on the CBF's mission to serve ministry and mission causes around the Globe.

COMPANY INFORMATION Headquartered in Decatur, Georgia, the CBFF is an independent financial ministry of the Cooperative Baptist Fellowship, providing wills & bequests counseling, leading & developing planned giving programs for churches, managing assets for growth, and being fiduciaries of trusts to meet donors' wishes. Created in 1994 by the General Assembly of CBF, the CBFF assists its clients and CBF Global in achieving and maintaining endowments, wills, and bequests, as well as assisting churches in the management of their endowments.

An independent Board of Trustees governs CBFF, with board members being elected to three-year terms, serving a maximum of nine years, governs the CBFF. All Directors serve without compensation. The President/CLGO is not a member of the Board but attends meetings of the Board and its committees. The CBF Executive Coordinator and the CBF Moderator or another Governing Board member s/he designates are Ex Officio board members.

WORKING RELATIONSHIPS The President/CLGO will report to the Board of Trustees, as well as in consultation with the CBF Executive Coordinator, and manage a staff of one. S/He will also manage the relationships with High Ground Investment Advisors, as well as a shared relationship for contracted accounting, finance, and auditing services. In addition the President/CLGO will work closely with the CBF Executive Coordinator and the CBF Development Staff on development and legacy gifts strategy and execution, as well as leverage the shared services of the CBF. Given the CBF's networked relationships, the President/CLGO will have a working relationship with CBF state and regional organizations and participate in Ministry Leadership Team meetings when appropriate.

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RESPONSIBILITIES

The President/CLGO will be responsible for the overall strategic direction of the CBFF consistent with its mission, and will be accountable for the development, management, performance, marketing, communications and public relations for all foundation activities. This executive will provide leadership in establishing short-term and long-term objectives, strategies, policies and plans in consultation and collaboration with the CBF Executive Coordinator, subject to the approval of the Board. The President/CLGO will also serve as the face of the CBFF, and represent the CBFF at the General Assembly, national and regional meetings, and outside meetings. Extensive travel is required, primarily in the southeast and southwest. Specific responsibilities of the President/CLGO will include, but not be limited to following:

Vision and Strategy

- Work with the Board and CBF leadership in developing, implementing and communicating an organizational vision and strategy.
- Partner with the Board and CBF leadership to ensure that the CBFF is seen as an essential benefit for donors and churches related to CBF.
- Lead and develop the CBFF employees and partners in delivering superb donor and church endowment services that meet their respective needs by enabling and supporting CBF ministries and missions globally, donors' wishes, and church endowment needs.

Leadership and Management

- Provide exemplary, innovative and inspired executive leadership for the CBFF as an essential ministry of the CBF.
- Work with the Board in overseeing board development, governance and education.
- Lead, manage and be engaged at all levels of the organization and CBF Global – even to the point of rolling up one's sleeves to enable CBFF's success.
- Select and oversee outside providers to ensure optimal investment performance and superior customer service delivery.

Communication

- Translate and interpret the CBFF's mission, strategy, vision, issues and other important information regarding the organization to the Board, the CBF Executive Coordinator, the CBF Governing Board, the CBF Development Staff, the broader CBF state and regional communities, ministers, employees, donors, churches, and a broad range of constituencies.
- Maintain and enhance key relationships within and external to the CBF to help foster the CBFF's mission.
- Enhance the visibility and reputation of the CBFF and its products and services through effective communication and marketing initiatives, including educating current and future donors and churches.

Growth and Development

- Develop and implement strategic and tactical educational, promotional and marketing plans to increase the number of donors and churches served, as well as assets under management, as well as working with CBF and the CBF Benefits Board to increase the financial literacy of CBF ministers, lay employees, and donors.
- Develop and implement an annual business plan that balances financial strength and client service, as well as executing plan within budget.

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CANDIDATE EXPERIENCE

The successful candidate will have a track record of delivering growth in assets under management, increasing an organization's financial strength, and in development of the donor base. It is preferred that the President/CLGO will have a leadership and management background in foundation and development activities, wills and bequests, and conducting planned giving campaigns. Ideally the candidate will have a working knowledge of CBF and its ministries and mission or have had experience with sister and related organizations. Additionally, the President/CLGO will possess the following qualifications:

- A working knowledge of estate planning, wills & bequests, financial markets as well as investment principles, strategies and risk management.
- Ability to analyze, assess and use relevant financial, social, economic, political and church trends that may influence CBFF's strategic direction.
- A working knowledge of utilizing social media and technology for both the increase of donors, asset growth, constituent communications, and service.
- Experience in sourcing, negotiating and managing outside service providers.
- Successful experience working closely and building relationships with a governing body, and assisting it to carry out its responsibilities effectively.
- Proven success in working with both a Board and executive leadership of sister organizations.
- A demonstrated understanding of how an organization uses a shared services model for economies of scale and financial soundness without sacrificing quality.
- A track record of growing an organization successfully as measured by assets, revenues, donor growth, and client service in a fiscally responsible way.
- Experience in recruiting and developing employees in a collaborative working environment.

PERSONAL CHARACTERISTICS

The President/CLGO will be a strategic and collaborative leader with the ability to manage an organization through growth and change. Additionally, the President/CLGO will possess the following personal characteristics:

- Ability to lead and represent the organization in a clear and compelling manner that is expressive of the CBF's and CBFF's values, and reflects an understanding and appreciation of a faith based, non-profit organization.
- Ability to inspire others to perform as part of a high-performing team.
- A person of high moral character and integrity who acts in accordance with a visible set of values and beliefs
- Possesses a strong sense of calling and vocation to lead the CBFF in a collaborative way with CBF Global and CBF Church Benefits.
- An effective communicator; writes and presents effectively; is a great listener; possesses a sense of humor.

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- A personal drive for excellence that helps the ongoing work of the organization.
- Ability to hold the mission and success of the organization ahead of personal recognition.
- Relationship builder; relates well to a wide variety of diverse styles, types and backgrounds; finds common ground; builds diverse networks.
- Diplomatic, political savvy and engenders confidence with diverse constituents and can build solid relationships by finding common ground.
- An ability to quickly assess a situation, to identify issues/problems, and to develop innovative and holistic solutions.
- Highly energetic with mental stamina to keep up with the demands of the job, be a self-starter, and work independently.
- Intellectually curious and a life-long learner.

RELIGIOUS AFFILIATION

It is preferred that the successful candidate be a member of the Cooperative Baptist Fellowship community. The candidate must be committed to acquiring a thorough knowledge of the CBF, including its governance, organization, culture and mission. Additionally, the successful candidate will have demonstrated his/her personal faith through involvement in a religious community. In addition the successful candidate must be willing to work collaboratively with CBF's Executive Coordinator and President/President/CLGO of the CBF Church Benefits.

EDUCATION

An undergraduate college degree is required; an advanced degree is preferred.

COMPENSATION

An attractive compensation package will be provided including a competitive salary and benefits package.

CONTACTS

Interested candidates should email their resume to:

Adam Granger, Assistant to the CBF Executive Coordinator
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770-220-1623