



Opportunity Profile

DIRECTOR OF GIFT PLANNING & INVESTMENTS
CHRISTIAN SCHOOL FOUNDATION

NELSON/KRAFT
AND ASSOCIATES

EXECUTIVE SUMMARY



Are you looking for a meaningful role in a growing, vibrant organization? The Christian School Foundation is seeking a Director of Gift Planning and Investments who can lead their Investment Team, provide financial guidance for schools, and support donors as they achieve their philanthropic priorities. The Foundation has a culture of integrity and professionalism, while also being nimble in how it responds to our donors and schools. They are a small team, so the ability to work well together and innovate as they fulfill their mission is crucial. If you are an analytically strong, detail-oriented leader with good relationship building skills, we would love to hear from you.



WHO WE ARE

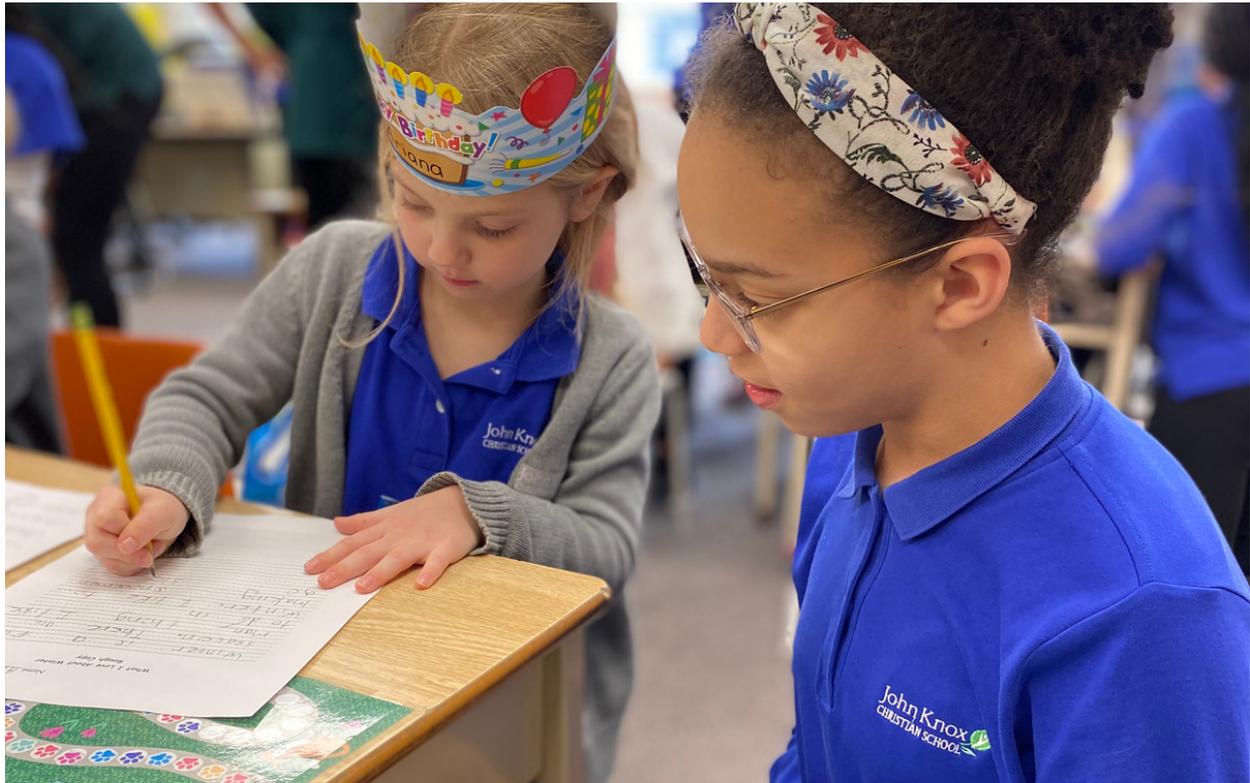
We draw Christian schools and donors together to expand the influence of Christ in our culture.

The Christian School Foundation is the communal undertaking of Christian schools from across Canada. It is founded on the belief that Christian education is a powerful way to expand the influence of Christ in our culture – a goal shared by all Christians.

Founded in 2014 through the amalgamation of three existing foundations, the Christian School Foundation is like a community foundation that is focused on Christian schools. We are committed to transparency and professionalism in all we do.

We help donors expand their options in supporting Christian schools, we responsibly invest the long-term assets of our member Christian schools, and we assist schools to enable effective conversations with their supporters around all kinds of planned giving.

THE JOB



POSITION SUMMARY

The Director of Gift Planning and Investments will play a key role in shaping the future of the Foundation, leading it to achieve its mission and strategic goals. Reporting to the President & CEO, the Director of Gift Planning and Investments will lead, direct and manage the staff and volunteers in the areas of operations linked to finance. The Director will do so in a way that fosters the values of the Foundation and nurtures a positive culture.

KEY RESPONSIBILITIES

Relationship with the President & CEO

The high level of cooperation between the President & CEO and the Director of Gift Planning and Investments ensures that the Foundation flourishes as it accomplishes its mission and strategic goals. Together, they share the task of visioning and establishing strategic plans designed to make that vision a reality.

The Director of Gift Planning and Investments will:

- Work with the President & CEO in developing the Foundation, providing leadership in the designated areas.
- Foster and maintain a constructive and harmonious relationship with other staff members based on mutual trust, respect, honesty and openness.
- Manage their affairs in such a way that the Foundation's culture of integrity, professionalism, openness, collaboration and innovation prevails.
- Interact regularly with the President & CEO, as well as other staff members, to maintain a high level of engagement within their appropriate roles.
- Provide the President & CEO with timely, accurate, and relevant information related to: the Foundation's Risk Management framework, the Foundation's overall financial performance, and any areas that might challenge assumptions and require adaptations to the Foundation's policies or procedures.
- Publicly express only those opinions and positions regarding Foundation affairs that are in keeping with the priorities and policies of the Board of Directors, in accordance with the applicable Confidentiality and Communication Policy.
- Lead the work of the Investment Committee and the Finance-Audit Committee in the fulfillment of the Terms of Reference applicable to each committee.

Relationships with Board Members, Committee Members, School-Foundation Liaisons and Volunteers

With respect to interactions with Board Members, the Director of Gift Planning and Investments will do so primarily through the President & CEO. From time-to-time the Director will be invited to attend board meetings in connection with special reports or initiatives to share with the Board, but would not normally be expected to attend all board meetings.

Role in the Investment Committee

- Oversee investment portfolio and assets management.
- Serve on the Investment Committee with key responsibilities that include the development of each meeting Agenda together with the Committee Chair, compiling and distributing the agenda and accompanying materials for each meeting.
- Assist the Investment Committee as it fulfills its Terms of Reference, including ensuring that the Investment Policy undergoes its required annual review.
- Maintain regular contact with all Fund Managers.
- Research additional and prospective Fund Managers or placements as directed by the Committee.
- Utilize Foundation software to prepare and distribute Quarterly and Annual Fund Statements for member schools or ensure access to these reports is available to member schools.
- Respond to inquiries from school financial administrators and school auditors related to financial interactions with the Foundation, including providing proactive advice regarding best practices and applicable regulations.
- Ensure any Investment Committee recommendations are presented to the Board and, upon approval, implemented.



Role in the Finance-Audit Committee

- Serve on the Finance-Audit Committee with key responsibilities that include the development of each meeting Agenda together with the Committee Chair; compiling and distributing the corresponding agenda and accompanying materials for each meeting.
- Assist the Finance-Audit Committee as it fulfills its Terms of Reference, including ensuring that the committee's Terms of Reference undergoes its required annual review.
- In coordination with the President & CEO and the Chair of the Finance-Audit Committee, prepare the annual Operations budget.
- Liaison with the bookkeeper on transfers, the establishment of Funds, and any matters related to the annual audit.
- Provide oversight to the work of the bookkeeper.

Relationship with Donors and Potential Donors

- In coordination with the President & CEO, pursue regular contact with existing and potential donors, including corporations and public bodies, according to the Annual Staff Work Plan.
- Lead Donor Stewardship efforts, with a focus on growing small and medium level donors.
- Respond to supporter inquiries about estate/Will & gift planning.
- In coordination with the President & CEO, seek out donors whose philanthropic priorities align with the Foundation's goals and provide means by which donors can accomplish these priorities.
- Take the lead in facilitating gifts of securities, property and any other type of gift that may be offered.

Relationship with Member Christian Schools

- In coordination with the President & CEO and the Manager of Schools and Grants, keep member and potential member schools informed of Foundation activities. This will include some level of regular connection with the financial staff and/or volunteers at member schools.

Relationships with Other Organizations & Allied Professionals

- Identify such professionals and organizations, whether provincial, national or international, and pursue these relationships.
- Create means for engaging with professional advisors.

Relationships with Staff

- Ensure that communication and information that will benefit other staff members is shared regularly in a transparent manner.
- Ensure there are effective practices in place to provide a progressive and supportive relationship with staff.

Financial Condition & Asset Development

- Provide oversight to the timely and efficient financial administration of the Foundation.
- Ensure there is an internal audit process that ensures that transactions with member schools are handled as they were intended, and in line with the Foundation's Charitable Purposes.
- Ensure there is an independent audit by a qualified public accounting firm of the Foundation's annual financial statements.
- In partnership with the President & CEO, ensure that the operations of the Foundation conform to CRA and other government regulations.



QUALIFICATIONS

- A Certified Financial Planner designation (or similar) is an asset.
- The ideal candidate has experience in gift planning, investment management or Christian education leadership.
- An open and inviting personality, and sufficient patience to repeat things many times in dealing with staff and volunteers at our member schools.
- A high sense of integrity that causes one to prefer gaining clarity from CRA before a decision is made, rather than being found offside later.
- An ability to exude confidence with our schools and donors as they guide the processing of less-traditional gifts (e.g. gifts of appreciated securities).
- Strong communication skills, particularly in one-on-one and small group situations, but ideally also in large group settings.
- At ease working in a culture that sees the Foundation as the servant of both Christian schools and donors.
- Values the gifts of teammates and a tolerance for their areas of weakness.
- Innovative in creating whole new approaches to challenges that arise.
- A positive mindset and motivated attitude, with a desire to influence our culture in the name of Christ.
- Good organization and relationship building skills.
- A high attention to detail and a passion for excellence.

OUR SEARCH TEAM



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JEFF PITCHFORD LEADING THE SEARCH

Jeff is an accomplished Senior Executive, with over 25 years of leadership experience across the chemical manufacturing and food processing industries. He wears many hats including Business Consultant, Executive Coach, Board Member, Forum Chair and Birkman Certified Professional. Jeff specializes in leadership development and team-based business success. He is passionate about developing leaders and building high performance teams.



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KEITH KNIGHT SUPPORTING THE SEARCH

Keith has a long career in leadership development, communications and marketing. Over the past decade he served as Executive Director of the Canadian Christian Business Federation, a national network of Christian business and professional leaders. He inherited a small group of business leaders consisting of seven chapters in southern Ontario and grew the organization into a national network of 70 chapters with a database of 6,500 business and professional leaders, including about 80 Christian non-profits. He thrives on relationship-building, discovering organizational and individual needs.



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778.385.0117

LARRY NELSON SUPPORTING THE SEARCH

Larry is a Chartered Professional Accountant and former CEO of the Baptist Housing Society in BC. He has served on many charity boards nationally and provincially including the board of the Canadian Council of Christian Charities. He has placed over 80 senior executives and worked with more than 50 not-for-profit organizations across Canada. He is passionate about lending his professional expertise to not-for-profit organizations.

ESTIMATED SEARCH TIMELINE

While every search is dynamic and time frames are hard to predict, the following is an overview of the expected timeline for this search:

Location: Flexible (preference for Hamilton, ON)

Application Deadline: May 30, 2022

Short List Interviews: July 2022

Hire Date: July 2022

HOW TO APPLY

Please forward a PDF of your resume and cover letter to info@nelsonandkraft.com.

Nelson/Kraft & Associates Inc. is an executive consulting firm that specializes in working with not-for-profits and for-profit businesses across Canada, assisting them in the placement of senior executives and directors.

Nelson/Kraft & Associates Inc. welcomes and encourages all interested applicants to apply for this position and is committed to the principles of diversity and inclusion in its hiring practices, and will only make distinctions among interested applicants in accordance with the applicable Human Rights legislation.

Nelson/Kraft & Associates Inc. also welcomes and encourages applications from candidates with disabilities. Accommodations are available on request for candidates taking part in the selection process. If you require disability-related accommodation during the recruitment process, please contact us.