

Updated Role & Activities for the Director of Planned Gifts & Investments at the Christian School Foundation  
(March 2024)

## **Purpose**

The purpose of this document is to set out the responsibilities, opportunities, duties, authority, and limitations of the Director of Planned Gifts and Investments of the Christian School Foundation. In this way, this document clarifies the role of the Director *vis a vis* the role of the CEO and by extension the Board of Directors and its Committees. It also helps establish the performance standards for this position.

## **Preamble**

The Director of Planned Gifts and Investments will play a key role in imagining what the Christian School Foundation might be, and then helping to bring that into being. The Director will lead in such a way that the Foundation achieves its mission and strategic goals. The mission of the Foundation is to draw together Christian schools and donors to expand the influence of Christ in our culture. The Director being an ordained pastor provides opportunities to preach and enter into various Christian communities where the ordained role is seen as important to providing teaching on stewardship as a response to God's grace. While doing this, the Director is responsible to, reports to, and is accountable to the President & CEO. While the President & CEO is ultimately responsible for all the Foundation's activities, operations, services, financial affairs and results, and ensures that the Foundation operates in accordance with the goals and governance processes established by the Board, the Director of Planned Gifts and Investments will lead, direct and manage the staff and volunteers in the areas of the Foundation's operations that are linked to Finance and Stewardship. The Director will do so in such a way that fosters the values of the Foundation and nurtures its positive culture.

## **Role Expectations**

### **1.0 Relationship with the President & CEO**

The high level of cooperation between the President & CEO and the Director of Planned Gifts 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. With respect to interactions with the President & CEO, the Director of Planned Gifts and Investments will create conditions, procedures, and decisions that strengthen and support the direction and protection of the Foundation, and that respect appropriate confidentiality and privacy around all activities.

The Director of Planned Gifts and Investments will:

- a.** work with the President & CEO in developing the Foundation, providing leadership in the designated areas;
- b.** foster and maintain a constructive and harmonious relationship with other staff members based on mutual trust, respect, honesty and openness;
- c.** manage their affairs in such a way that the Foundation's culture of integrity, professionalism, openness, collaboration and innovation prevails reflecting Christ-like behaviour in all areas;

- d. interact regularly with the President & CEO, as well as other staff members, to maintain a high level of engagement within their appropriate roles;
- e. provide the President & CEO with timely, accurate, and relevant information related to:
  - i. the stewardship and effective giving activities
  - ii. the Foundation's Risk Management framework
  - iii. the Foundation's overall financial performance
  - iv. any areas that might challenge assumptions and require adaptations to the Foundation's policies or procedures.
- f. 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 (Policy 1.8).
- g. lead the work of the Investment Committee and the Finance-Audit Committee in their stewardship of both the Foundation's assets, but also in the way they care for the assets of our member schools. The Director will lead these committees in the fulfillment of the Terms of Reference applicable to each committee in line with Biblical stewardship principles.

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

With respect to interactions with Board Members, the Director of Planned Gifts 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.

With respect to interactions with Committee Members, School-Foundation Liaisons and Volunteers, the Director of Planned Gifts and Investments will create or foster conditions, procedures, and decisions that enable the successful completion of each group's tasks.

## **3.0 Relationship with Donors and Potential Donors**

With respect to interactions with donors and potential donors, the Director of Planned Gifts and Investments shall pursue conditions, procedures, and decisions that foster their engagement with and participation in achieving the Foundation's mission ensuring the donors can accomplish their intended desire in making a Kingdom impact through Christian education and discipleship, while ensuring appropriate confidentiality and privacy.

- a. In coordination with the President & CEO, the Director of Planned Gifts and Investments will pursue regular contact with existing and potential donors, including corporations and public bodies, according to the Annual Staff Work Plan. The Director being an ordained pastor will have opportunities to make an impact in church communities sharing the gospel and our stewardly response to the gospel through giving of time, spiritual gifts, finances and caring for creation.
- b. The Director of Planned Gifts and Investments will lead Donor Stewardship efforts, with a focus on growing small and medium level donors. These activities can include preaching and teaching on stewardship and a Biblical understanding of our care for the gifts God has given.
- c. The Director of Planned Gifts and Investments will respond to supporter inquiries about estate/Will & planned gifts.

- d. In coordination with the President & CEO, the Director of Planned Gifts and Investments will seek out donors whose philanthropic priorities align with the Foundation's goals and provide means by which donors can accomplish these priorities according to God's leading.
- e. The Director of Planned Gifts and Investments will take the lead in facilitating gifts of securities, property and any other type of gift that may be offered.
- f. Recognizing the importance of stewardship and our response as Christians, it is preferable for the Director to be ordained or have strong knowledge of Biblical Stewardship principles.

#### **4.0 Relationship with Member Christian Schools**

With respect to interactions with member and potential member Christian schools, the Director of Planned Gifts and Investments will pursue conditions, procedures, and decisions that foster their engagement and participation in achieving the Foundation's mission, ensuring that Christian schools can accomplish their intended desire to make a kingdom impact in Christian education and discipleship, while ensuring appropriate confidentiality and privacy.

- a. In coordination with the President & CEO and the Manager of Schools and Grants, the Director of Planned Gifts and Investments will keep member and potential member schools informed of Foundation activities particularly in the advancement of stewardship and providing resources to encourage their supporting communities to give, effectively and generously. This will include some level of regular connection with the financial staff and/or volunteers at member schools.

#### **5.0 Relationships with Other Organizations & Allied Professionals**

With respect to relationships with any organization or allied professional that could advance the mission of the Foundation, the Director of Planned Gifts and Investments will represent the Foundation with clarity and integrity in its relationships with such organizations that fall within this role's purview.

- a. The Director of Planned Gifts and Investments will identify such professionals and organizations, whether provincial, national or international, and pursue these relationships.
- b. Create means for engaging with professional advisors.
- c. The Director of Planned Gifts and Investments will encourage Christian churches to advance their mission by supporting and fostering Christian education whether through presentations, preaching or other means of teaching.

#### **6.0 Relationships with Staff**

The Director of Planned Gifts and Investments will ensure that communication and information that will benefit other staff members is shared regularly in a transparent manner. They will ensure there are effective practices in place to provide a progressive and supportive relationship with staff.

#### **7.0 Financial Condition & Asset Development**

The Director of Planned Gifts and Investments will pursue actions and practices that will foster healthy and sustainable finances that will adequately support the mission of the Foundation and grow God's kingdom by strengthening Christian education.

### **Role Qualifications**

The ideal candidate has experience in gift planning, investment management, and Christian education leadership in schools or churches; ordination is an asset.

A Certified Financial Planned designation (or similar) is an asset.

An open and inviting personality, and sufficient patience to repeat things many times.

A high sense of integrity.

An ability to exude confidence with our schools and donors as they guide the process of donating traditional and non-traditional gifts.

Compassion and pastoral care for donors and families often dealing with end-of-life decisions regarding the resources they have been given by God to steward.

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 organizational and relationship building skills.

Good presentation skills with the ability to proclaim the good news and our response to it.

A high attention to detail and a passion for excellence.