



President and CEO
United Methodist Foundation of New England
Derry, NH

“To energize the ministries of United Methodist churches and related agencies by providing financial services and education programs that promote faithful stewardship.”

Statement of Mission

The United Methodist Foundation of New England (Foundation) seeks a visionary and energetic President and CEO (President) to realize its vision of being the leading financial and educational stewardship resource center for United Methodists.

The upcoming retirement of the Foundation’s highly regarded President of eight years creates an opportunity for an innovative leader to combine spiritual commitment, strong management skills, acumen in donor development, and knowledge of institutional investing to advance the Foundation’s mission. In collaboration with clergy, laity, and the Foundation’s board of directors, the President will play a major role in providing strategic leadership for advancing the ministry of extravagant generosity, legacy giving and thought leadership in New England.

The successful candidate will be expected to:

- Lead the Foundation to a new level of growth during the next 10 years;
- Expand the donor development ministry of the Foundation;
- Advance pastoral and lay leadership training;
- Raise the profile and visibility of the Foundation so that its mission, values, accomplishments, and unique track record are ever more widely recognized; and
- Strengthen the Foundation’s partnership with the New England Annual Conference (NEAC) and with related agencies.

Isaacson, Miller – a national executive search firm specializing in leadership searches for mission-driven organizations – is assisting the Foundation in this search. All inquiries and applications may be addressed in confidence to the search firm as indicated at the end of this document.

HISTORY

In June 1991, the United Methodist Foundation of New England was established by the former Maine, New Hampshire, and Southern New England Annual Conferences of The United Methodist Church to serve New England United Methodism. Later, in 2010, the state of Vermont joined the New England Annual Conference when the former Troy Conference was dissolved, adding more than 100 local churches to the NEAC. The Foundation's Articles of Agreement allow it to administer funds entrusted to it by United Methodist institutions and agencies both within and outside the NEAC.

The Foundation is one of the largest United Methodist Foundations in the country with over \$110 million in assets under management. It is charged with:

- Assisting United Methodists in making major gifts to benefit their local churches/agencies. The Foundation's planned giving program includes charitable remainder trusts and gift annuities which total over \$2 million;
- Implementing a donor development program to steward current donors and identify future donors who will support the mission and ministry of the United Methodist Church at all levels from the local church to denominational agencies;
- Assisting United Methodist churches, boards, and agencies in the management of their reserve/endowed funds. As a reflection of congregational confidence in the Foundation, more than 380 churches and agencies in the New England Annual Conference (60%) have placed reserve and endowment funds with the Foundation;
- Providing financial services and educational programs that promote faithful stewardship and giving growth;
- Making grants and providing financial assistance to foster strategic initiatives that promote faithful personal and congregational stewardship;
- Offering a loan program which serves the building or capital needs of United Methodist churches & agencies throughout New England.

The Foundation office is located in Derry, NH, less than a 45-minute drive from downtown Boston. Further details about the Foundation can be found at www.umfne.org.

THE ROLE

The new President of the Foundation will inherit a highly respected organization with an impressive legacy of prudent financial investing, commendable investment performance, and superior customer service. While these strengths will serve as the cornerstone for future success, the incoming leader will be expected to do much more than sustain momentum. Working closely with the board and staff, the President will be expected to bring new creative vision, break new ground, and provide the animating force to take the Foundation to its next level of leadership and impact.

The President will work with a 24-member board representative of the clergy and laity of United Methodist congregations throughout New England, to refine the strategic direction and lead the day-to-day functions of the Foundation. The President will be responsible for an annual operating budget of more than \$1 million and a nine-member staff of talented and committed

professionals, including a three-person leadership team – Chief Financial Officer, Director of Development, and Director of Stewardship.

The successful candidate will have a proven record of leading and mentoring a staff, must recognize and value the existing collegial and collaborative culture of the Foundation, and have the ability to strengthen its reach. The Foundation seeks candidates with a passion for the mission, coupled with acute business and organizational leadership skills. The new President must be a driving force externally; possessing outstanding interpersonal, communication and marketing abilities.

OPPORTUNITIES AND CHALLENGES FACING THE NEXT PRESIDENT

The key opportunities and challenges for The United Methodist Foundation of New England's new President are as follows:

Lead the Foundation to a new level of growth during the next 10 years

The next President will lead the Foundation's staff as it re-doubles efforts to work with local United Methodist churches & agencies in New England, generating new revenue for the Foundation, and retaining its status as a leader in creating innovative products and services for reserve/endowed funds. These efforts will include intentionally reaching out to ethnic congregations in New England and developing a strategy that recognizes that the Foundation's market may now include other religious organizations here in the northeast. In the process, the President must ensure that the Foundation stays agile and responsive to changing conditions, new trends, and unexpected challenges.

Expand the donor development ministry of the Foundation

The President will take an active role in the ministry area of donor development within the NEAC. Efforts here will include providing planned giving information to individuals within the Foundation's donor development program, and visitation of current and potential donors when appropriate.

Advance pastoral and lay leadership training

The President will support the Foundation staff in providing educational and training opportunities, in partnership with the New England Annual conference, for clergy to grow as pastoral leaders within the unique post-Christian culture of New England. Lay leadership training will also be integral to supporting local church and agency efforts to cultivate stewardship. Thought leadership through training will continue to cultivate effective & sustainable development habits within the New England Conference.

Raise the profile and visibility of the Foundation so that its mission, values, accomplishments, and unique track record are ever more widely recognized

The President will lead and nurture strategic and collaborative partnerships with colleagues, clergy, community and civic leaders, advocacy organizations, churches and agencies. S/he will

serve as a compelling external presence and relationship-builder throughout the NEAC. The President will also engage, inform, and work in a symbiotic partnership with the NEAC leadership. The President will be the public ambassador for the Foundation's value proposition and must be able to excite existing partners, potential donors, and other stakeholders about the mission and work of the Foundation.

Strengthen the Foundation's partnership with the NEAC and with related agencies

While the Foundation operates independent from the NEAC and other related agencies, the next President of the Foundation must have the skills needed to work harmoniously within the NEAC organization and structure. This will include a keen recognition that the missions of these organizations are interwoven and collaborating in ministry contributes to the success of all.

PROFESSIONAL EXPERIENCE AND PERSONAL CHARACTERISTICS

We seek individuals of faith, integrity, and intelligence with demonstrated success in building, implementing, and managing financial services and educational programs that promote faithful stewardship. We recognize that finding all the following experiences and characteristics in a single person may be ambitious, but we anticipate that our call will be answered by a number of candidates prepared to meet the challenges we have outlined and those that will arise.

Qualifications

- Bachelor's degree from an accredited college or university, an advanced degree preferred;
- A track record of working with an active board; making the best use of its strengths to advance the organization;
- Substantial experience and talent for cultivating and managing relationships, whether they be with pastors, laity, staff or investors; strong commitment to exceptional client service;
- Experience or knowledge of the structures of the United Methodist Church;
- A visionary leader with the ability to strategize within a rapidly changing environment;
- Experience in donor identification and development for a religious non-profit organization with credible experience in the solicitation of major gifts;
- Credible working knowledge of basic accounting concepts;
- Demonstrated working knowledge of the concepts and principles of investment management, financial instruments suitable for the institutional environment, and fiduciary oversight of endowments;
- An entrepreneurial leader with solid competencies in planning, fiscal management, and general operational management with a minimum of five years of successful senior management experience;
- Demonstrated ability to articulate the principles of Christian stewardship;

Leadership & Management Experience

- Demonstrated ability to motivate and inspire people to do their best work, which encourages creativity and helps them succeed;
- A collaborative leadership style; experience in team building;

- Entrepreneurial spirit and drive;
- An eye for strategic opportunities and innovative partnerships;
- Discipline and focus in setting realistic priorities, meeting or beating goals, and running a fiscally sound operation;
- Demonstrated capacities to plan, manage and assess operations; coordinate services, efficiently supervise staff and solve problems;

Personal Qualities

- An understanding of Christian stewardship;
- Comfort in a work environment with a faith-based mission and interacting with churches;
- Integrity, honesty, fairness and an ability to communicate in a timely and transparent manner;
- Excellent communication and diplomatic skills; articulate and persuasive, comfortable in the spotlight, without necessarily seeking it; someone with the ego strength to take the heat but share the credit, to defer as appropriate and confront as necessary;
- Personal credibility to win the respect of the ministry.

TO APPLY

All inquiries, nominations, cover letters and resumes may be electronically submitted to:

Monroe “Bud” Moseley or Keight Tucker Kennedy

Isaacson, Miller

263 Summer Street

Boston, MA 02210

www.imsearch.com/6637

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