



# Church Benefits Association

## Executive Director

Remote Role



## Background

The Church Benefits Association (CBA) is the largest association of church benefits boards and plans in the United States. Its 51 members, representing most major faith traditions including many Christian and Jewish denominations, provide employee benefit plans including retirement, health, life, and disability insurance, and other benefits to their faith communities. CBA's vision is to be the indispensable resource for faith-based benefit providers, while its stated mission is to foster interfaith collaboration, education, and professional relationships to enhance the benefit programs and services of its member organizations. CBA accomplishes this by bringing its member organizations together virtually and in person at its annual conference and throughout the year in different forums to share best practices and learn from one another. CBA's core values include being: generous in spirit; collaborative in approach; respectful of differences; and welcoming of diversity.

CBA is a 501(c)(3) not-for-profit organization that has historically outsourced its day-to-day operations and annual conference planning functions to an association management company. It is now seeking to hire its first full-time Executive Director (ED) to build upon its strengths and move CBA's mission forward, including operationalizing a recently completed strategic plan.

## Position

Reporting to the CBA Board, the Executive Director is responsible for providing strategic leadership of the organization, advancing a sound organizational vision, maintaining and growing excellent programs and services for all CBA member organizations, and working collaboratively with the CBA Board of Directors to ensure that the CBA mission is fulfilled. S/he will also be responsible for coordinating with the Church Alliance (CA) activities, a partner organization to the CBA who shares many of the same members as CBA and who actively participates at CBA's annual conference. The Church Alliance serves as an advocacy group on legislative and regulatory issues that impact faith-based benefit providers.

The Executive Director will work to implement priorities identified in the recently completed strategic plan, which includes four strategic priorities: program & resources, membership, people and infrastructure, and financial. The ED will serve as the CBA's public voice, marketing and delivering its services to its member organizations. The ED will interact with many different constituencies, including CBA Board members, member leaders and their staff, and CBA partner organizations, among others. The ED will be responsible for the day-to-day management of all financial and operational matters of the CBA, manage all annual CBA conference-related activities, coordinate board-related functions of the CBA, and maintain a strategic mindset about improving how the CBA serves its member organizations.

Successful candidates will possess the communication and executive management skills to stimulate creativity and continue the delivery of excellent customer service. The ED will work

closely with the Board to promote an open, inclusive environment that emphasizes cooperation and teamwork. In addition, successful candidates will possess sound judgment, a sense of humor, diplomacy, and excellent interpersonal and managerial skills.

## Responsibilities

### Leadership & Executive Management

- Lead and execute the strategic, operational, and creative direction of the CBA, ensuring that the CBA's vision, values, brand, and strategic priorities are evident and consistent in every aspect of the organization
- Work with the Board to implement the strategic plan and articulate and develop strategic initiatives; evaluate progress on strategic objectives with the Board
- Set and advance a positive, success-oriented, and collaborative culture within the organization
- Maintain open lines of communication with the Board, CBA members, outside partners, and vendors
- Represent the CBA in business matters and correspondence in consultation with CBA Board, as necessary
- Where appropriate, seek partnerships and collaborations with related organizations and other service providers for product or service enhancement and additions
- Lead special projects approved by the Board, such as grant proposals or other external work with funders
- Update and maintain policies and procedures manuals

### Board of Directors Relations & Support

- Plan and manage all logistics for Board meetings, including establishing, maintaining, and communicating Board meeting calendar; initiating Board meeting notification and call for agenda items; preparing Board meeting agendas in consultation with the Board Chair; preparing and sending all meeting materials in advance
- Coordinate Board member election process in partnership with Board Chair and Nominating Committee Chair
- Monitor meeting attendance to ensure quorum present at Annual Meeting
- Oversee the transition of newly-elected members of the Board of Directors and officers
- Update and maintain Board by-laws as needed
- Communicate relevant board actions to the membership

### Financial Management

- Prepare the CBA annual budget in partnership with the Finance/Budget Committees/treasurer
- Prepare, analyze, and present financial reports to the CBA Board
- Prepare and analyze ad-hoc financial analyses upon request by the Board
- Partner with the Board to determine appropriate membership dues levels

- Establish and maintain current accounting processes and procedures (and/or work in collaboration with external bookkeeper)
- Oversee the outside accountant in their preparation of the independent audit and tax filings
- Implement the CBA Investment Policy in coordination with the Board

### Membership Services

- Develop procedures and implement technologies to ensure enhanced delivery of member services, including requests for information, updating and maintenance of knowledge bases, and other ad-hoc requests
- Design, implement, and maintain a web-based repository of curated documents for access by members
- Coordinate the work of purchasing coalitions to maximize return to member organizations
- Coordinate special interest committee leadership at the annual conference and other times throughout the year

### Information Technology & Communication

- Develop and maintain a web-based member database that enables secure access by CBA members to various kinds of information including member contact information, the knowledge base, etc.
- Develop and maintain a web-based Board of Directors and committee database for secure access by CBA Board members
- Develop and maintain CBA website, incorporating appropriate access to member-related databases
- Develop and implement a multi-channel (email, social media, web, mail) communications strategy in partnership with the Board

### Annual Meeting Management

- Partner with the Annual Meeting Planning Committee and the outside conference planning firm to select and secure meeting locations, including contracting with hotels and other related vendors
- Establish and monitor the annual meeting budget with the Planning Committee, including preparing financial reports as needed
- Develop, in coordination with the Planning Committee, the program and conference content, as needed
- Coordinate Planning Committee meetings, including site visits and program planning sessions
- Manage conference sponsorship outreach to CBA member business partners

## Qualifications

- Belief in the mission and purpose of CBA, and has an understanding and appreciation for religious organizations
- Experience as a senior executive in the association management, nonprofit, and/or business sectors with a proven track record of achievement in organizational leadership, management, administration, and financial operations
- Strong leadership, business acumen, strategic planning, and implementation skills
- Skilled at leveraging technology to deliver on an organization's strategic objectives
- Experience and comfort working with a volunteer board of directors
- Excellent presentation and communication skills; ability to influence, motivate and inspire volunteers
- Self-starter with demonstrated success in building and growing new organizations, departments, or initiatives
- Excellent interpersonal, political, negotiation, and diplomatic skills
- Ability to maintain a model of high personal, ethical, and professional standards
- Ability to gain the trust and respect of multiple constituencies, including the Board and member organizations
- Comfortable working with stakeholders in a remote environment in which colleagues work across locations and time zones and technology is used heavily for communications and project management
- An understanding of the kinds of products and services, including retirement and health benefits provided by CBA members to their constituents (or be positioned to acquire that knowledge)

## Compensation and Benefits

A competitive compensation package will be made available to the qualified candidate with an annual salary range of \$120,000-\$150,000 and comprehensive benefits.

This position description is based upon material provided by the Church Benefits Association, an equal opportunity employer.

To apply to this position, please click [HERE](#).

---

Natalia Kepler, Senior Talent Consultant

Chasity Nickleson, Associate

