



LEADERSHIP PROFILE



President and Chief Executive Officer **Georgia United Methodist Foundation (GUMF)** Peachtree Corners, GA

Empowering people to change lives!

-GUMF Mission

A COMPELLING OPPORTUNITY

Georgia United Methodist Foundation (GUMF) is an independent, nonprofit ministry serving the congregational communities and institutions of the Methodist Church in Georgia. GUMF is a leading Methodist foundation nationally, with over \$200 million in assets. The foundation serves and supports the entire Methodist community in Georgia, across the North and South Georgia Conferences.



GUMF empowers congregational partners through investment management services, loans, and endowment services. It empowers individuals by offering endowment development and management resources, financial literacy training, and investment vehicles. GUMF provides “how to give” information, financial tips, and timely advice, through various media.

This is a time of change, challenge and promise for GUMF and the Church.

GUMF is stronger than ever financially, with a committed Board and talented staff. As the UMC addresses internal tensions, manages through the economic and community impacts of COVID19, and seeks to advance diversity, equity and inclusion, GUMF commits to serve and support all Georgia Methodist and Wesleyan communities.

The new CEO is called to a bold mandate, grounded in faith: to lead GUMF forward by shaping and implementing strategic vision and valued services.

The CEO will position GUMF at the forefront of excellence and innovation, as a beacon of unity and a partner of choice. The CEO will strengthen and broaden trust and relationships across Georgia Methodist and Wesleyan congregational partners and communities of all sizes and perspectives.



GUMF is poised to grow through philanthropy and diversified, highly-valued services and offerings including loans and investments. As GUMF grows, it creates more opportunities for investment in congregational communities across Georgia. Foundation growth magnifies Kingdom-focused philanthropic support and grant-making. The new CEO will be a strategist, relationship-builder and grower on behalf of GUMF's mission and the Kingdom of God.

THE CEO MANDATE



The CEO will lead GUMF into its next era of innovation and impact. The CEO will be an inspiring, faith-based leader called to lead a strategic, visionary agenda, deepen relationships and enhance reputation, capacity and impact. The CEO will have a record of success relevant to GUMF and the Church, with passion for the mission of empowering positive change. Reporting to the Board of Directors, the CEO will:

- 1. Be an inspiring, transformational leader.** The CEO will be strategic and forward-looking, called to lead and position GUMF at the forefront of performance, mission and innovation. The CEO will energize staff and the Board, and will relate well with North and South Georgia Conference Bishops and Treasurers, clergy, individuals, and congregational partners ranging from 50 to 5000 members. The CEO will be a source of cohesion and fresh ideas, vision and strategy. The CEO will lead growth and change in ways that are faith-based, inclusive and philanthropically impactful.
- 2. Grow relationships and giving.** As the face and voice of GUMF, the CEO will be a visible and passionate presence statewide. The CEO will be dynamic, engaging and effective at building relationships with clergy, volunteers, funders and donors across the community. The CEO will generate engagement, enthusiasm and support—inspiring annual giving, endowment, planned and transformational gifts, loans, investments and legacy commitments in addition to greater awareness and participation across the North and South Georgia Conferences.

- 3. Increase revenue.** The CEO will be innovative at fostering growth in loans, investments and endowment services, and will implement promising new programs and revenue streams, to advance its mission of serving the Kingdom. The CEO will build awareness of quality programs like the Clergy Financial Literacy Academy, and will develop valued new programs, such as fiscal planning, stewardship and digital offerings, that add revenue and enhance fiscal management across congregations.
- 4. Enhance GUMF awareness and reach.** The CEO will be active, visible, and a compelling communicator able to build GUMF's profile, relevancy and engagement. The CEO will be or become a thought leader in faith-based finances, stewardship and sustainability. The CEO will broaden reach, connection, relationships and impact with diverse audiences throughout the North and South Georgia Conference areas.
- 5. Be a great business and financial manager.** The CEO will be a strategic, faithful leader with business and financial acumen. The CEO will manage effectively through current and future challenges, analyze and advance current and new opportunities, and develop a sustainable and adaptive business model that ensures a thriving GUMF future.
- 6. Nurture a positive, engaged culture.** The CEO will promote collaboration, inclusion, innovation and a high-performance culture that makes GUMF a best place to work and projects positively across the state. The CEO will foster trust, and will work to build the competency and confidence of individuals and congregational partners to achieve financial growth, sustainability and impact.

PERSONAL CHARACTERISTICS

The ideal CEO is a dynamic, faith-based Methodist leader with personal magnetism, vision, financial acumen and passion for mission. Knowledge of Methodist and Wesleyan history and traditions, as well as the current UMC structure and dynamics, is prized. Personal assets will include:

- A passion for the mission and potential of GUMF.
- An authentic, inspiring and energizing love of people.
- Proven relational, fundraising and business-growing skills.
- Financial and business acumen, coupled with entrepreneurial spirit.
- Ability to lead, unify and inspire people to work together.
- Compassion, listening and communication skills.
- Demonstrated commitment to diversity, equity and inclusion.

- Self-confidence *and* humility.
- Ability to build collaboration and consensus, *and* make tough decisions.
- Change-management and culture-building experience.
- Strengths in strategy, innovation and execution.
- Creativity, resilience and adaptive leadership skills.
- A calm, accessible, welcoming and unanxious presence.
- A sense of humor.

THE ORGANIZATION

Georgia United Methodist Foundation (GUMF) was founded in 1984 as a nonprofit extension ministry of The United Methodist Church. Its mission is empowering people to change lives. The organization's purpose is to help Methodists leave a legacy and make a lasting contribution to the Church and its ministries.



GUMF ranks in the top 10 among 57 Methodist foundations nationally, based on its assets of over \$200 million. The organization manages \$176 million in kingdom-focused investments, \$31 million in loans to UMC churches and ministries, and philanthropic impact of \$75,000 in scholarships and grants. GUMF has a deep history and relationships across the state of Georgia. Its staff is talented and committed, and its Board of Directors is strong and engaged as a governance body and partner to the CEO.



GUMF aspires to be a force for the future of the Methodist church in Georgia, and to be the preferred partner for individuals and congregational communities regardless of size, location, and diverse perspectives.

GUMF's multi-year strategic plan focuses on:

- Growing and deepening relationships across the state of Georgia.
- Continually assessing the needs of clients, and developing or modifying services to better meet their needs.
- Marketing and building greater awareness of GUMF by “telling the story.”
- Maintaining professional, auditable, appropriate policies and procedures and promoting staff growth and development.

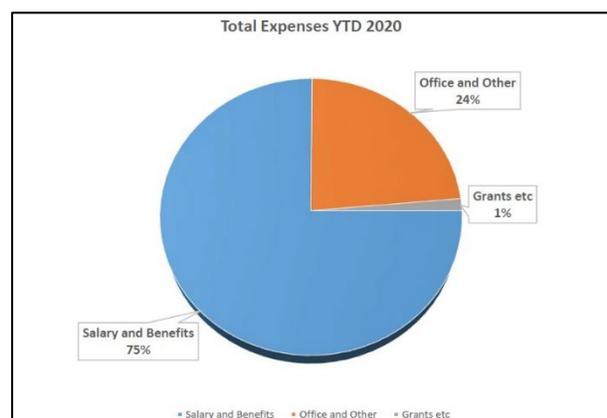
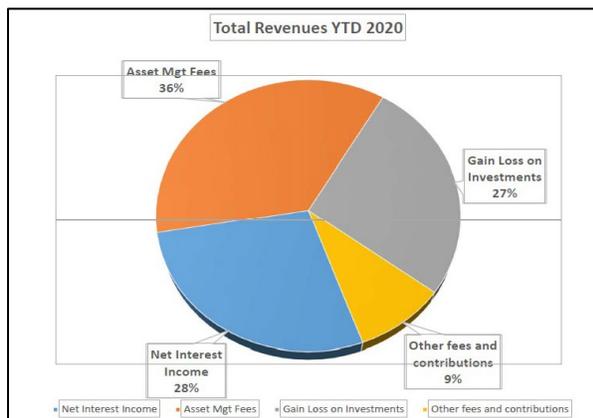
GUMF ministry goals include:

- Partnering with United Methodists to grow God's Kingdom for the transformation of the world.
- Serving as the investment manager for long-term funds for Methodist churches and congregational partners across Georgia.
- Encouraging and equipping congregational partners and ministries to implement effective stewardship including a planned giving program.
- Providing expert counsel, superior value and a wide range of stewardship services.
- Empowering United Methodist clergy to achieve high levels of personal and church financial literacy.

At a time of many external challenges, GUMF is financially sound and well positioned for sustainability and impact over time. In 2020, year-to-date through September, GUMF is managing \$200 million in assets, including \$176 million in assets under care and \$31 million in loans for refinancing, expansions, renovations and new construction for Georgia UMC churches and ministries. Two-thirds of GUMF loans are in pre-paid position, and there have been no charge-offs. GUMF has provided scholarships and other support to congregational partners, totaling \$75,000 in philanthropic giving.

Revenues are currently generated through:

- Net income from loans.
- Management fees for the money GUMF manages.
- Distributions from GUMF's own investments.
- Philanthropic contributions.
- Fees related to programs and ministries.



More about GUMF can be found at www.gumf.org.

THE LOCATION

GUMF is located in Gwinnett County, Georgia, north of Atlanta, and serves the entire state of Georgia. Georgia is home to four million residents, about 20 Fortune 500 companies including Delta Air Lines, UPS, Home Depot and The Coca-Cola Company, and the world's busiest airport.

The state hosts numerous institutions of higher learning, among them Emory University, Candler School of Theology, Wesleyan College, Reinhardt University, Georgia Tech, Morehouse and Spelman Colleges, the University of Georgia and Young Harris College.

Some of the world's most significant governmental and nonprofit organizations are based in Atlanta, among them the Centers for Disease Control and Prevention (CDC), CARE, Boys & Girls Clubs of America and The Carter Center.

THE RELATIONSHIPS



GUMF works closely with both the North Georgia Conference and the South Georgia Conference of the UMC. Current clergy leadership of GUMF participates, at each Bishop's request, on the Extended Cabinet of each Conference, highlighting the critical relationship of the CEO with the leadership in each Conference.

GUMF's President and CEO manages a full-time staff of approximately ten professionals and reports to the Board of Directors. The CEO's current direct reports are the Chief Financial Officer, Regional Vice President, Vice President of Development and Director of Lending.

For potential consideration or to suggest a prospect, please email

GUMF@BoardWalkConsulting.com

or call

Kathy Bremer or Paula Nicholas at 404-403-3266 or 404-420-5851.

www.BoardWalkConsulting.com
