



Abundance[®]
CANADA

Chief Executive Officer

EXECUTIVE BRIEF



Accredited
IMAGINE CANADA



TABLE OF CONTENTS

| | |
|---------------------------------------|---|
| The Opportunity..... | 1 |
| About Abundance Canada..... | 2 |
| Additional Information..... | 4 |
| Board of Directors..... | 4 |
| Key Duties and Responsibilities | 5 |
| Qualifications and Competencies | 5 |
| Attributes and Qualities..... | 6 |
| Biographies..... | 7 |

FOR MORE INFORMATION

KCI Search + Talent has been retained to conduct this search on behalf of Abundance Canada. For more information about this opportunity, please contact Sylvie Battisti, Senior Vice President, KCI Search + Talent by email at AbundanceCanada@kcitalent.com

Interested candidates should send their resume and a letter of interest to the email address listed above by **February 27, 2025**. All inquiries and applications will be held in strict confidence.

The hiring salary range for this position is \$200,000 to \$270,000 and Abundance Canada offers a competitive benefits package.

Abundance Canada is an equal opportunity employer and encourages applications from all qualified applicants and especially welcomes applications from racialized persons, women, Indigenous/Aboriginal People of North America, persons with disabilities, LGBTQ2S+ persons, and other underrepresented groups.

Accommodations are available on request for candidates taking part in all stages of the selection process. If you require any accommodations, please notify the KCI Search Consultant.



Chief Executive Officer Abundance Canada

THE OPPORTUNITY

Abundance Canada is seeking a Chief Executive Officer (CEO) to provide leadership and oversight to the strategic direction, operations, and overall success of the organization. This role requires a visionary leader who is passionate about the purpose of Abundance Canada, philanthropy, financial stewardship, and excellence in leadership.

Reporting to the Board of Directors and working closely with the Senior Leadership team, the CEO is responsible for establishing strong relationships with donors, board members, staff members and the charitable community, developing and executing innovative strategies, providing oversight to investment management, ensuring compliance with regulations, managing risk, and driving sustainable growth.

While the role can be performed from any Abundance Canada office, or remotely, there is a preference for the CEO to be based close to our Head Office in Winnipeg. Additionally, this position will require frequent travel to meet with existing and potential clients; visits to regional offices; and attendance at Board, leadership team, staff and Gift Planning team meetings.

The hiring salary range for this position is \$200,000 to \$270,000, based on experience, and in addition, Abundance Canada offers a highly competitive benefits package.



ABOUT ABUNDANCE CANADA

Abundance Canada is a public foundation with 50 years of experience helping donors across the country make a difference through charitable giving. Our team of dedicated 23 professionals are located in Ontario and western Canada.

The audited statements for the fiscal year end of January 30, 2024, show that Abundance Canada attracted over \$83 million in donations, managed over \$260 million in assets, and distributed more than \$53 million to 2,000 Canadian charities.



We pride ourselves in keeping the donor experience flexible and easy, no matter the complexity of their charitable plans. Our goal is to double our reach and impact within the decade.

Purpose

Abundance Canada believes generosity changes everything. Generosity is transformational for the donor and recipient, and the world is a better place when people live generously. We support generosity through customizable charitable giving plans to help donors increase their charitable impact.

Values

Our values are shaped by a vision of generous living, rooted in our story. These values guide our attitudes, decisions, and actions:

- Our relationship with donors is a sacred trust.
- We serve and act with integrity, professionalism, and confidentiality.
- We commit to the work of justice, inclusion, diversity, and equity.

Everyone at Abundance Canada works together as one team to further our purpose and values.



The History of Abundance Canada

Abundance Canada's purpose is rooted in our history. In the early 1970s, leaders from the Mennonite tradition were inspired to make charitable giving easier for people who wanted to share their financial resources. In 1974, we opened our doors as Mennonite Foundation of Canada.

Beyond encouraging people to share their financial resources, we adopted investment policies that embraced social responsibility. The impact of socially responsible investing (Environmental, Social, Governance) made us a pioneer in ethical/responsible investing. ESG remains a hallmark of our investment policies today.

Our gift planning was ahead of its time and as the organization grew, a network of institutions and donors were attracted to both the vision of charitable giving and the benefit of our services. In 2016, we changed our name to Abundance Canada to reflect our growing and diverse donor base.

We believe generosity changes everything. Throughout our history, we have evolved and adapted, but our values remain the same.

Responsible Investing at Abundance Canada

Responsible investing is about helping build a better world. It's about investing in a way that reflects your values.

Abundance Canada believes in a world where everyone lives generously because generosity changes everything. As a public foundation that offers donor-advised funds, we also believe that how and where we invest is consistent with our values.

Our investment policies incorporate environmental, social and governance (ESG) criteria that are shaped by our values.

Investing our Values

- **Respect the dignity and value of all people** – Abundance Canada will seek to invest in companies that respect and support the basic human rights of all people and who do not attempt to benefit from the misfortunes of disadvantaged individuals or communities. This includes providing fair and sustainable compensation for employees and extending opportunities to all people.
- **Support world peace** – Abundance Canada will seek to invest in companies whose activities and practices contribute to peaceful and healthy relationships between individuals, communities, nations and within society in general. We will avoid investing in companies whose focus is on the development, production, or sale of weapons and other instruments of war and destruction.
- **Promote social betterment** – Abundance Canada will seek to invest in companies that work towards building healthy families and communities through housing, the environment, food, education and health care. Furthermore, we aim to invest in companies that proactively address systemic injustices regarding race, gender, religion, sexual orientation or socioeconomic status. We will avoid investments in companies materially engaged in the production or sale of alcoholic beverages, tobacco, cannabis, pornography and gambling.
- **Observe management practices** – Abundance Canada will seek to invest in companies that operate in an honest, compassionate and responsible manner, value and empower employees, respect workers' rights, engage in responsible resource management, employ sound practices of corporate governance, avoid unnecessary litigation and pursue alternative dispute resolution options, and are competitive but respectful of their competitors.



ADDITIONAL INFORMATION

[Abundance Canada](#)
[About Abundance Canada](#)
[Leadership Team](#)
[Board of Directors](#)

[Our Generosity Plan](#)
[Technical Information Sheets](#)
[Our Gift Planning Consultants](#)
[2023 Annual Report / 2023 Financial Statement](#)

BOARD OF DIRECTORS

Jennifer Thompson, Chair
Shannon Peters, Vice Chair
Alan Walker, Secretary
Ross Weaver, Treasurer
Mark Beck
Gillian Doucet Campbell
Gaylen Duncan
Robert Heinrichs
Arnold Machel
Karen Martin Schiedel
Doug Romanuk
Stephen Yantzi



KEY DUTIES AND RESPONSIBILITIES

- **Strategic Leadership:** With the Board, develop and drive the execution of a long-term vision and strategy for Abundance Canada to guide the organization and optimize results.
- **Operational Oversight:** Effectively oversee all aspects of operations, including financial management and policy management. Financial management includes budgeting and forecasting, and appropriate allocation of resources to ensure organizational efficiency while maintaining the highest level of service to donors and beneficiaries. Policy management includes maintaining and enforcing appropriate policies to guide operations while ensuring legal compliance and managing organizational risk.
- **Organizational Leadership:** Leading and inspiring the staff team.
 - Responsible for hiring (direct and indirect reports), managing compensation, performance management, and overall compliance regarding HR matters.
 - Effectively oversee all aspects of operations, including financial management, policy development and adherence, budgeting and forecasting, resource allocation, operational risk management and performance measurement versus strategy-driven key performance indicators.
- **Stewardship and Financial Risk Management:** Recognizing that the CEO is the chief steward of the organization's financial assets and the financial assets entrusted to Abundance Canada by donors, the CEO is responsible for ensuring these resources are professionally managed within Board approved risk tolerances and generating maximum risk-adjusted returns.
- **Donor and Community Relations:** Build and maintain strong relationships with existing and prospective donors and targeted communities. Build and strengthen Abundance Canada's corporate brand.
- **Board Relations:** Communicate, collaborate, build and maintain strong trusting relationships and responsiveness to board direction in a manner that supports the planning and achievement of strategic priorities.
- **Compliance and Governance**
 - Ensure compliance with all applicable laws, regulations, policies, and ethical standards governing public foundations and DAFs.
 - Collaborate with legal counsel to stay updated on changing regulations and implement best practices in governance.
- **Sectoral Relations and Leadership:** Provide leadership and contribution to sectoral organizations where and in a manner that advances the strategies of Abundance Canada.

QUALIFICATIONS AND COMPETENCIES

- Progressive experience in senior leadership roles including proven experience at a C-suite level, preferably within an organization that offers Donor Advised Funds in the not-for-profit or wealth management and financial services sectors.
- Visionary mindset with a passion for and authentic commitment to driving positive social change through philanthropy.
- Demonstrated understanding of philanthropy principles, financial management, governance best practices, and legal requirements applicable to public foundations holding DAFs (Donor Advised Funds).



- Investment, financial and charitable gift planning expertise including extensive demonstrated knowledge in the technical aspects of charitable gift planning, gift planning instruments and related tax laws as well as a solid understanding of the Canadian philanthropic landscape.
- Track record of successfully leading organizational growth initiatives and achieving strategic objectives.
- Proven success leading, coaching and supporting high-functioning staff teams.
- Ability to navigate complex stakeholder relationships while maintaining integrity and fostering collaboration.
- Exceptional communication skills including written, verbal and presentation skills and the ability to inspire diverse stakeholders through compelling storytelling.
- Strong financial acumen with experience in investment oversight, portfolio management, financial analysis, and risk management.
- Proficient in leveraging technology for operational efficiencies and data-driven decision-making.
- Bachelor's degree in a relevant field (e.g., business administration, finance) required; advanced degree such as MBA preferred. CPA designation or other financial/wealth planning designations are also preferred (e.g. CFP-Certified Financial Planner, CEP, MFA-P or others).

ATTRIBUTES & QUALITIES

The CEO models the highest levels of character, competence, creativity, and client focus. Specific attributes include the following:

- **Strategic Thinking and Action:** Ability to think and problem-solve creatively while effectively operating within set organizational operating parameters.
- **Leadership and Management:** Effective leadership, management and mentoring of a highly effective team of executives. Inspires and models character and competence for the organization as a whole.
- **Results Orientation:** Focus on delivering strategic results and meeting tactical milestones. The CEO is driven to bring the organization to the “next level” as defined by its strategic plan.
- **Professionalism, Diplomacy and Discretion:** Ability to operate in a position and environment that requires the utmost professionalism, discretion and respect for privacy and confidentiality.
- **Networking:** Creates productive and trusted relationships with targeted communities, donors and prospective donors.
- **Communication:** An engaged and engaging communicator who understands the importance of strategic listening and asking questions to fully understand needs and identify/create opportunities. They can effectively communicate (verbally and in writing) to large and small groups, and individuals.



BIOGRAPHIES

Jennifer Thompson, Chair of the Board



Jennifer Thompson began her career in technology in 1973. She implemented governance and risk management frameworks for large organizations in the retail and financial services industries, such as business processes, systems, and technologies for CPP Investments and overseeing due diligence for corporate acquisitions with accountability for the resulting systems integration and oversight.

As a Board Member for charitable and not-for-profit organizations, Jennifer's guiding principles are giving back to the community and making a difference. She has served as Board Chair for Breakfast for Learning, Chair of the

Finance Committee for Eglinton St. George's United Church, and Chair of the Board for Havergal College.

Shannon Peters, Vice Chair of the Board



Shannon Peters is an award-winning Human Resources professional who emphasizes relational excellence and team building and has extensive operations experience in the financial sector. She currently works as an HR Business Partner with Canadian Tire. Other career highlights include initiating back-office operations for Canadian Tire Bank and launching a new department for business analysis and project management functions as Senior Manager at Meridian Credit Union.

Following her family tradition of giving back and appreciating opportunities to connect with and learn from others, Shannon has served as a Board

Member for YMCA Niagara on the Audit and Compliance, Personnel, and Governance Committees. At Radiant Care, she advocated for and assisted with transforming the role of the Board from an operational focus to a governance-based model.

