



CPBI
www.cpbi-icra.ca

CANADIAN PENSION & BENEFITS INSTITUTE

BRIEFING DOCUMENT

Executive Director (interim 12 months with the possibility of becoming permanent)

- **The Canadian Pension and Benefits Institute is a national not-for-profit organization dedicated to providing education and networking opportunities in the pension, benefits and institutional investments industry in Canada.**
- **CPBI is the leading organization of its kind in Canada. Canadian plan sponsors, service providers, consultants and regulators involved in pensions, benefits and investments look to CPBI for education and networking opportunities.**
- **The CPBI distinguishes itself from other organizations through**
 - **Regional strength**
 - **Presentation of all views through open membership**
 - **Volunteer resources**
 - **Active discussion/Debate**
 - **Education of members**
 - **Highest benefit to cost ratio**

Membership is comprised of the following main constituent groups:

- **Finance & Investment professionals**
- **Governments**
- **Labour unions**
- **Insurance and trust companies**
- **Law & Consulting firms**
- **Human resources professionals**
- **Municipalities**
- **Post-secondary institutions**
- **Professional groups**
- **Not-for-profit organizations**

Mission and Goals

The mission of the CPBI is to provide members and other interested individuals and groups with an opportunity to discuss and debate, to participate in high quality high value and cost effective education and networking forums focused on exchange of information and best practices related to pensions, employee benefits and other related issues through a network of regional and national programs. In doing so, CPBI is recognized as the pre-eminent organization for all constituents seeking to discuss or gain insight in these matters. CPBI also aims at providing quality and relevant information on new developments and industry trends, as well as on practical application of technical changes through regular activities at both the regional, national and national levels.

Governance

CPBI is a volunteer led organization. The Board of Directors is composed of ten members with industry expertise and representing 8 regions across Canada. The organization is governed as a single organization, with fiscal responsibility residing with the Board of Directors.

CPBI has evolved into more of a staff-managed model, with the Board of Directors increasingly focused on strategy while relying more heavily on the Executive Director (ED) to run the organization.

The Opportunity

The candidate holds the top-level position in the CPBI organization and is responsible for all daily operations of the organization and working closely with the Board of Directors.

The Executive Director is primarily responsible for guiding the vision and direction of the organization as established by the Board of Directors. This includes managing industry outreach programs with members, regional councils and industry stakeholders, day-to-day policy, and financial oversight, as well as overseeing development and management of the organization's web presence, staff management and training, fiscal management, regulatory compliance, membership, and marketing operations.

The Executive Director is held directly responsible by the Board for performance in any of these areas and the organization as a whole.

Position Profile: Executive Director

Reporting to the Board of Directors, the Executive Director (ED) has overall leadership, management and operational responsibility for the organization, including the CPBI's staff, programs, sustainability, regulatory compliance and execution of its mission. The individual will initially develop deep knowledge of field, core programs, operations, and business plans.

Management and Leadership

- Ensure ongoing program excellence, rigorous program evaluation, and consistent quality of finance and administration, marketing, communications, and systems; recommend timelines and resources needed to achieve the strategic goals.
- Actively engage and energize CPBI, board members, volunteers, event committees, and partnering organizations.
- Support a strong Board of Directors; serve as ex-officio of each committee; seek and build board involvement with strategic direction for ongoing operations as well as for the rollout of national programs and services.
- Lead, coach, develop, and retain CPBI's high-performance team. Address staffing matters in a timely manner and hold employees accountable for their performance.
- Ensure effective systems to track progress, and regularly evaluate program components, so as to measure successes that can be effectively communicated to the board, regions, and other constituents.

Strategic Thinking and Problem Solving

- Anticipate opportunities and determine required outcomes
- Develop innovative, conceptual, analytical and supportive solutions and assert self in providing information and solving challenging issues
- Influence decision-making based on sound research and analysis
- Inspire, lead and advocate for effective change management practices and guide the organization in the change process
- In collaboration with the Board, design and complete the strategic business planning process

Planning

- Build relationships with stakeholders in the pension, benefits and investment industry.
- Lead the national presence that publishes and communicates results and best practices with an emphasis on the successes of the programs and services as a model for regional replication.
- Work with the Board of Directors to lead the development and implementation of an operational plan to ensure alignment with CPBI's vision and strategic plan.
- Create, in consultation with the Board of Directors, a vision and plan to grow CPBI's membership; enhance and prove the quantity and quality of innovations of products and services provided at the national level.
- Ensure plans are aligned with emerging trends and responsive to the needs of members

Marketing and Communications

- Expand revenue generating activities to support existing program operations and membership sustainability and growth.
- Deepen and refine all aspects of communications—from web presence to external relations with the goal of creating a stronger brand.
- Act and engage publicly with external bodies as the face of the CPBI.
- Establish good working relationships and collaborative arrangements with industry stakeholders, volunteers, regulators, media, and other organizations to garner new opportunities and help achieve the goals of the organization.
- Build relationships with regions for the purpose of engaging and sustaining member relations.
- Play the key role in the marketing efforts of the CPBI; and protect and promote the CPBI brand nationally.
- Develop and implement strategies to enhance CPBI’s reputation as the preeminent organization for the professional development of Canadian pension, benefits and investment professionals.

Risk Management

Demonstrate sound knowledge of governance, financial and risk management principles with respect to planning for and managing risk:

- Budget development and analysis
- Cost estimating and forecasting/analysis
- Comply with legislation, policies and practices applicable to the appropriate planning for and effective use of human, physical and capital resources
- Establish policies and best practice in mitigating risk

Qualifications and Experience

The ED will be thoroughly committed to the CPBI’s mission. The ED will have proven leadership, coaching, and relationship management experience. Specific requirements and competencies include:

- A university degree in a business-related discipline is preferred, with 5-10 years of senior management experience; track record of effectively leading a non-profit or voluntary sector organization and staff; knowledge of federal and provincial legislation applicable to non-profit/voluntary sector organizations, including employment standards, human rights, occupational health and safety, charities, taxation, etc.
- Developed and operationalized strategies that have taken an organization to the next stage of growth
- Excellence in organizational management with the ability to coach staff, manage, and develop high-performance teams, set and achieve strategic objectives, and manage budgets
- Past success working with a Board of Directors with the ability to cultivate existing board member relationships
- Strong marketing, public relations, experience with the ability to engage diverse stakeholders

- Strong written and verbal communication skills; a persuasive and passionate communicator with excellent interpersonal and project management skills
- Demonstrated ability to communicate fully in both French and English
- Action-oriented, entrepreneurial, adaptable, and innovative approach to business planning
- Ability to work effectively in collaboration with diverse groups of stakeholders
- Demonstrate integrity and ethical behaviour, initiative, commitment to excellence and effective management skills including:
 - Responsibility
 - Diplomacy
 - Tenacity
 - Dependability
 - Organizational skills
 - Detail orientation
 - Positive attitude
 - Mission-driven
 - Self-directed

The CPBI's national office is located in Montreal. The ED may occasionally need to remain available nights and weekends. Due to the national scope of the CPBI, some travel is required; the amount can vary but typically can range from 10% to 15% of a business year. Administrative support is provided by a full-time staff and several contractual part-time employees.

Facts about CPBI

CPBI represents:

- An open forum to share and discuss ideas as well as a gathering place for professionals from the pension, benefits & investment industry
- A national gathering point for the presentation of diverse views through open membership.
- An extensive network of rich and varied volunteer resources, the driving force of CPBI
- Eight active Regional Councils responsible for regional programming in the Pacific, Northern Alberta, Southern Alberta, Saskatchewan, Manitoba, Ontario, Québec and the Atlantic Regions
- A dynamic National Office, located in Montreal, responsible for the day to day management of the operations working in synergy with the eight regions to develop quality national programs

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