Opportunity Profile: PRESIDENT

AGORA SEARCH GROUP

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ORCHARD ALLIANCE

About Orchard Alliance

Who We Are

- **Orchard Alliance** and its predecessor ministries have served The Christian and Missionary Alliance (The Alliance) with loans, investments, and charitable tools for more than sixty years.
- **A wholly-owned subsidiary of The Alliance,** we help Alliance churches, districts, individuals, and ministry partners do immeasurably more with the financial resources God has entrusted to them.

  Like Jonathan's armor-bearer in 1 Samuel 14:7, we are on mission with our ministry partners "… heart and soul."
- **Mission:** To equip God's stewards for greater Kingdom impact.
- **Vision:** To see every person and ministry we serve empowered in biblical stewardship, accomplishing God's purposes for His glory.
- **Core Values:** Prayer, Service, Excellence, Integrity, and Balance.
- **Orchard Alliance exists** for the sake of others and the Kingdom, not for building treasure on earth.

About Orchard Alliance

Wallace Community (Alliance) Church, Wallace, Nebraska

Colorado Springs office

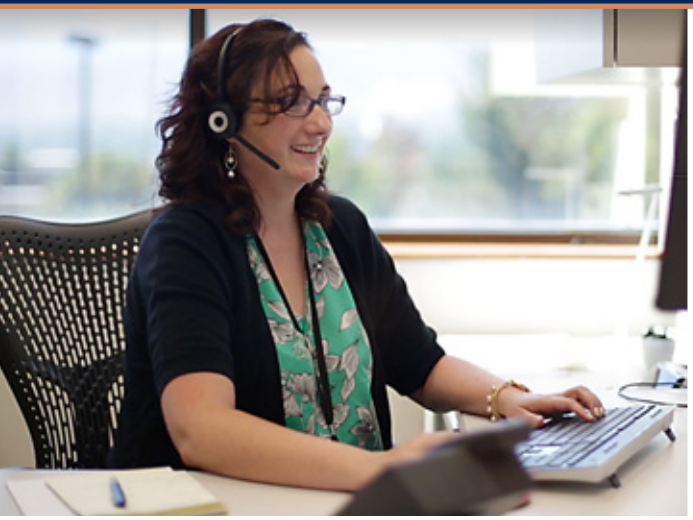
Operational Highlights

- $399M in total assets
- $247M in loans, 487 church borrowers
- $261M in invested dollars, 4,529 accounts
- $120M of charitable assets under management, 684 accounts
- 87% of revenue is generated from The Alliance and Alliance ministries
- 35 employees, the majority based in Colorado Springs, Colorado

History

- 1898 - First charitable instrument issued
- 1958 - Lending ministry initiated
- 1979 - First licensed securities
- 2018 - Merger of church extension fund and charitable foundation to form Orchard Alliance

About Orchard Alliance



A “Cornerstone” Ministry of The Alliance

- Orchard Alliance holds 75% of all church/property loans in The Alliance
- Provided hundreds of Alliance churches with financial resources and expertise to help them grow and thrive
- A major partner and financial supporter of Alliance church health and growth initiatives
- $19.6M gifted to The Alliance in the past five years as a result of planned giving efforts from four gift and estate design consultants

Like-minded Ministry Partner Expansion

- 70 evangelical Christian ministries consider Orchard Alliance their back-office partner for planned giving and non-cash gifts
- A small number of ministry partners have an established development effort that allows them to be effective in planned and non-cash giving efforts with donors
- Significant opportunity exists to engage ministry partners regarding pursuing alternative funding sources for operations and long-term initiatives

Brand Personality and Messaging

- Brand Position: Servant Leadership reflects our true character and personality. Serving is at our core, but as a leader, we help remove obstacles and assist others in reaching their objectives.
- Brand Voice: Pastoral, expressed as experienced, personable, clear, intentional, serving, and inviting.
- Communication Guideposts: Experienced, Proactive, Faithful, and Family.

Transition Process

Downtown Colorado Springs, Colorado

Orchard Alliance's Board of Directors has launched a search for a visionary leader to become its next President. The President of Orchard Alliance serves as its chief executive officer, responsible for the development and execution of a broad range of organization-wide initiatives that deliver, through excellence, ministry services—primarily to the worldwide ministry of The Christian and Missionary Alliance—and furthers and expands like-minded ministry services to the broader evangelical Christian community.

At a pivotal moment in the organization's history, the next President of Orchard Alliance will have the opportunity to set a strategic direction that capitalizes on the ministry's extensive history, experience, financial strength, and deeply respected reputation—both within its denomination and to the larger evangelical Christian community. The next two decades in Orchard Alliance's future will have a significant impact on the lives of stakeholders in and of The Alliance and many other ministry partners.

Prior to officially launching this search, the Board of Directors formed a Transition Committee composed of board members to engage internal and external stakeholders in broad conversation encompassing the many aspects of Orchard Alliance's mission and vision. As a result of this initiative, the Transition Committee received input from several Alliance ministry leaders, ministry partners, and Orchard Alliance staff whose collective input and insights around the critical experiences and capabilities required for Orchard Alliance's President are reflected in this presentation.

Mary and I have been grateful to invest in the Shell Point Village Agreement with Orchard, expanding our options for the future. They genuinely want to assist Alliance workers.
—Jonathan Schaeffer, Sr Pastor Grace (Alliance) Church

Priorities for the Next President

1 **Identify** strategic priorities that advance the mission and vision of the organization, and support those of its ministry partners and The Alliance.

2 **Be the face** and chief promoter of Orchard Alliance, championing biblical financial stewardship and generosity, at small and large events, in churches, colleges and retirement centers, with our Board, The Alliance, and ministry partners.

3 **Engage**, train, lead and build the next generation of Orchard Alliance leaders that further the values and core purposes of Orchard Alliance.

4 **Develop** a strategy for the long-term location of Orchard Alliance to best serve The Alliance, ministry partners, stakeholders, and staff.

As I think of the partnerships that have forwarded the work of God through the C&MA, the very top of that list is Orchard Alliance. At every turn and with growing significance, Orchard Alliance continues to serve an essential role in our mission advance.
—John Stumbo, president U.S. C&MA

CRITICAL CAPABILITIES

1 Affiliations/Memberships

Required to be an active member of an Alliance church and refrain from behavior that detracts from the Christian testimony of this ministry and The Alliance. Previously engaged in a prominent ministry of The Alliance with broad-based Alliance relationships preferred.

2 Education and/or Experience

Master's degree or equivalent in a business, leadership, or ministry concentration; or ten or more years related experience and/or training; or equivalent combination of education and experience. A proven track record in high-level leadership roles with top-level responsibility and accountability. Demonstrated background or expertise in finance with a working knowledge of investments, marketing and planned giving concepts, tools, and techniques. Successful experience developing and interacting with a board of directors, trustees, elders, etc. An experienced inspirational and motivational writer/speaker in Christian and non-Christian venues and a savvy contributor to social media commentary.

3 Certificates, Licenses, Registrations

Must have or obtain proper securities licenses and professional designations relevant to Orchard Alliance's product and ministry offering to demonstrate authoritative credentials inherent to a highly respected leader in the ministry and industry represented by Orchard Alliance.

4 Physical demands, Working conditions, and Travel

The work environment characteristics are variable due to the significant amount of travel that is required and the diverse demands of the role. Travel will include international venues affiliated with The Alliance where ease and comfort may be limited. Reasonable accommodations may be made to enable individuals with disabilities to perform the essential functions. The role of the President requires a level of "self-care" to maintain a healthy work-life balance and to assure ongoing personal development and soul-care. In concert with the annual goal-setting process, the President will create an annual plan to address maintaining a healthy work/life balance that ensures both ongoing personal development and a proper level of self-care and soul-care.

ATTRIBUTES

1. The president is the **embodiment of purpose and passion for the mission** of Orchard Alliance.

2. **The primary leader** of a transformational team, staff, and board, embracing change where necessary with a willingness to take appropriate risks as a common element of the position.

3. **An organized thinker** with discernment for issues crucial and tangential to the future of Orchard Alliance whether they be spiritual, developmental, organizational, financial, or strategic.

4. **A visionary** with a passion to continually explore, nurture, challenge, and grow ministry vision beyond the image of today into the dreams for tomorrow.

5. The **centralized figure and spokesperson** of all that Orchard Alliance represents in all venues, means, and methods.

6. An **unwavering and dedicated supporter** of the mission and vision of The Alliance and all its family members.

EXPERIENCE

1 **Successful leadership of a complex organization,** inside or outside of ministry, incorporating responsibilities at the highest levels.

2 **A track record of sound strategic and financial decision-making and judgment** that moved an organization forward, whether capitalizing on opportunities or overcoming challenges.

3 **Has built and empowered high-performance leadership teams** and an organization that reflects evangelical Christian values.

4 **Proven skills to manage, inspire, influence, and collaborate** with a diverse set of stakeholders, particularly in an evangelical Christian environment.

5 **Demonstrated capacity as a transparent and compelling spokesperson** who furthers the reputation, stature, and resources of an organization or initiative.

6 **A body of work,** on behalf of an organization, that demonstrates a high capacity for innovation, entrepreneurship, growth, and change management.

OPPORTUNITIES

1 Capitalize on the **longstanding Alliance relationship, partnership, support, and legacy.** This is where Orchard Alliance has a respected reputation, has been engaged for decades, and earns the vast majority of its income. This market is now the best and it has access better than any other market it should choose to enter.

2 **Long-term financial strength and stability.** Lending is the primary source of financial stability. The lending model is simple and proven. It can be repeated and is predictable. Policies and practices are refined and time-proven.

3 **Excellent leadership, staff and a strong board.** All areas are experienced and have developed strong working ties and teamwork.

4 Although Orchard Alliance has developed **deep relationships with The Alliance** at its highest leadership levels, doing the same **at the church and church member level** has the potential to multiply ministry substantially.

5 As The Alliance pursues **strategic initiatives to increase engagement with the churches and pastors**, opportunities exist for Orchard Alliance to deepen its strategic partnership with The Alliance.

6 In recent years The Alliance has proven that its **constituency can be engaged effectively through various media methods.** Orchard Alliance has the opportunity to learn from The Alliance and mirror these techniques for improved messaging and access.

7 The Alliance family legacy is strong and has an **effective network of engagement.** Orchard Alliance has the opportunity to leverage the Alliance family for more effective communications and engagement.

CHALLENGES

1 Orchard Alliance offers several investment opportunities that range from simple debt securities to sophisticated blended instrument portfolios. It **relies on third-party expertise** as the sophistication increases.

2 When the national office of The Alliance moved to Ohio in 2021, Orchard Alliance **lost the benefit of proximity to denominational leadership.** Maintaining relationships with existing leadership and developing relational connectivity with newly hired personnel will be challenging to accomplish from a distance.

3 Assets under management are the benchmark of a healthy planned giving program. **Growth in assets under management is necessary** to continue a robust program.

4 All but one of Orchard Alliance's **senior management team will reach retirement age in the next 10 years.** The acquisition and development of a new team for the future will be very important.

5 The **role of ministry partners is undecided** due to their relatively low level of opportunities presented and income earned, but require a certain amount of service level to maintain.

6 Several factors are changing in the areas served due to COVID. The manner in which people give, attend church, and communicate are changing. **Being rightsized in products, services, and staff** for changes in the US church and parachurch will be critical going forward.

CHALLENGES (cont.)

7 **The age of many board members will produce significant turnover** in the next few years. This will require the acquisition of new members with appropriate skills to serve in the future.

8 The trend of Americans living longer has the potential to have a profound impact on the reserve requirements for charitable gift annuities. Market returns of the past decade may not be as robust over the next decade. As life expectancies continue to increase and market returns potentially decline, **certain charitable instruments may develop weaker financial results.**

9 **Market volatility and government policies** can create in donors and ministries a negative view, which could impact ongoing activity and the willingness to participate in gift and estate designs developed by Orchard Alliance on behalf of ministries, thus negatively impacting assets under management and revenue earned.

10 Though **ministry partners** may seem to be a growth opportunity, many **lack the budgets and staff** to have an effective development effort. Without development professionals working with donors, the creation of gift and estate designs and plans is less likely to occur.

Orchard has been a faithful partner in helping me lead and cope with several crises Puerto Rico has gone through recently, including hurricanes, earthquakes, and financial recessions. Orchard officers and personnel are always available, caring, and very professional regarding our every need. Having such reassurance gives you hope and peace of mind. And for that, we will be forever grateful.

—Rev. Javier Gómez Marrero, District Superintendent, Puerto Rico District of the C&MA

Our History

We have served The Alliance in the area of financial stewardship for over sixty years. We help individuals, churches, districts, and ministry partners do immeasurably more with the financial resources God has entrusted to them.

Orchard Alliance is the combination of two significant ministries of The Alliance, the Alliance Development Fund (ADF) and The Orchard Foundation (TOF). This merger, which officially was completed in 2018, brought together two financial stewardship ministries.

The fingerprints of both ministries date back several decades. ADF traces its roots to an impassioned speech on the floor of the 1958 General Council of The Alliance in Buffalo, NY. TOF traces its roots to the first gift annuity issued in The Alliance in 1898. For several years these two ministries functioned as offices within the greater Alliance framework under the general guidance of The Alliance's treasurer. In the late 1970s, both ADF and TOF formalized into fully constituted departments of The Alliance with their own leadership teams reporting to the treasurer of The Alliance. At this juncture, both departments embarked on the essence of today's ministry.

ADF was established to be a church extension fund. Its ministry was serving The Alliance as a source of loans funded by the issuing of debt securities. At its start, it accumulated the many loans and securities issued by some of the regional districts of The Alliance through unsanctioned programs into a fully constituted and licensed entity, able to conduct securities offering in the entire United States. The model was simple: offer a security that resembled a savings account or a certificate of deposit; pay a market competitive interest rate for the use of these funds; offer first mortgage loans for church buildings, renovations and land; charge a commercial-grade interest rate on these loans; and live off the interest margin. Subsequently, ADF was incorporated in 1996 as a subsidiary of The Alliance with its own leadership and board, and merged in 2018 into the singular organization of Orchard Alliance. Growth has occurred year over year in assets and net assets which allowed ADF the opportunity to reinvest its financial strength into The Alliance. This financial model continues to this day and is the chief source of income for Orchard Alliance.

TOF was established as a funding department and ultimately the charitable foundation and planned giving expert for The Alliance. It held and served as custodian and fiduciary on assets generated from charitable instruments such as charitable gift annuities, charitable remainder trusts, endowments, institutional reserve funds, and donor-advised funds. On again, off again over the years, the responsibility for generating charitable products flowed between TOF and The Alliance. In 1998, TOF moved from being a department of The Alliance called Stewardship Ministries to a subsidiary of The Alliance with its own leadership and board and merged in 2018 into the singular organization of Orchard Alliance. During its journey of several decades, it steadily acquired expertise and assets under management. Today, great effort is being extended to build this side of Orchard Alliance. A successful effort would increase assets under management substantially and greater gifts would flow to The Alliance and God's Kingdom.

What others say about us

I'm thankful for loans Orchard Alliance has provided to ministries and how that has advanced the cause of Christ. I'm also thankful for retirement funds they have stewarded well that I can count on. Without Orchard, our development approach would have to change greatly as they provide expertise in planned giving, will creation, and legacy planning that we can point our Alliance donors to.

– Tim Meier, Vice President for Development, U.S. C&MA

Orchard Alliance has been a tremendous blessing to us, both personally and professionally. Anita and I have chosen to transfer most of our personal savings and investments into the stewardship of the Christ-honoring professionals at Orchard, and we have been more than pleased with the results. Our local bank could never match what Orchard has helped us achieve, along with the personal counsel from trusted advisors that helped us make wise decisions.

– Rev. Ronald J. Morrison, Senior Pastor, Hope Alliance Bible Church

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It's been such a huge benefit to know that we can trust Orchard [Alliance] with the planned giving needs of our honored donors. Our partnership gives us the assurance that our donors will be taken care of by Orchard [Alliance]'s team of Christian professionals in the most efficient and trustworthy manner.

– Joan Polito, Donor Engagement Manager, Faith Comes By Hearing

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To do ministry is not easy, especially when monetary resources are not enough to face the demands of maintaining a building. Orchard Alliance has always been ready and willing to extend us a hand in time of need and in difficult situations. For that thank you so much, and may the Lord increase your horizon. Your support has made our ministry at the Crossing smoother, and more effective in our community, and to our church members.

– Rev Danny Garrido, The Crossing Church | Iglesia el Cruce

Orchard Alliance worked with us in the midst of COVID-19 to ensure we had an affordable loan that wouldn't force us to reduce resources from our ministries. Within less than a year we've already seen a rate reduction and a cash rebate again allowing us to put our gifts where they are needed most.

– Joseph Chinnici, elder, The Plant Church of the C&MA

Do immeasurably more
for the glory of Christ

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