JOB DESCRIPTION

JOB TITLE: Chief Financial Officer & Treasurer (CFO)

JOB CODE:

Exempt: Yes | **Supervisor:** Office of the Bishop

Employee Name:

SUMMARY: The CFO advises the Bishop in the administration and stewardship of the temporal goods of the Diocese, developing and implementing policies and procedures in accord with Canon Law and civil law. While providing financial expertise and advice to the Bishop, is able to articulate the overall financial condition of the Diocese at any point in time and works closely with Diocesan leadership, Diocesan Finance Council, Diocesan Investment Advisory Committee, pastors, clergy, principals, and other Diocesan leaders on a broad range of financial and administrative matters.

ESSENTIAL DUTIES AND RESPONSIBILITIES:

- Works closely with the Vicar General and Chancellor, serving as financial advisor to the Bishop.
- Inherent in carrying out the duties and responsibilities of this position is maintaining a high level of confidentiality on all diocesan matters.
- Works closely with the Director of Human Resources regarding diocesan employee benefits, Priest and Lay Employee Pensions.
- Analyzes and makes recommendations pertaining to all major financial decisions involving parish, school, and other diocesan entities.
- Serves as the primary financial representative in working with the Diocesan Finance Council, Investment Advisory Committee, Foundation Board of Trustees, and other related consultative bodies established by the Bishop and Canon Law (and any ad hoc committees assigned by the Bishop).
- Determines creative solutions to unique financial challenges.
- Reviews monthly and annual financial statements for diocesan administrative offices, diocesan management, Diocesan Finance Council, and appropriate external organizations.
- Coordinates interactions with diocesan legal counsel as necessary, on issues pertaining to diocesan financial and administrative compliance.
- Directs communications and compliance with the IRS and other regulatory agencies.
- Oversee and direct all finance, accounting, and financial reporting, treasury investment management activities, audit, and budget process in collaboration with the Diocesan Controller.
- Collaborates on property and real estate matters, including new construction/major renovation, extraordinary repairs/capital improvements, leasing, purchases, and sales, ensuring adherence to Diocesan Policy in collaboration with the Diocesan Director of Facilities and Facilities Committee.
- Oversees the Diocesan Property and Casualty Insurance Program in collaboration with Risk Management. Promotes risk management mindset throughout the Chancery organization and in parishes, schools, cemeteries, and leased facilities.
- Oversees all external financing, banking, and investment relationships.
- Provides direction and supervision for all department managers listed below. Provides meaningful performance appraisal review and performance development plan for directors.
    - Controller
    - Director of Information Technology
    - Director of Facilities
    - Parish Services Director
    - Brady Faith Jail Ministry Coordinator
    - Diocesan Risk/Claims Manager
    - Director of Catholic Cemeteries

  - Executive Director of the Foundation of the Roman Catholic Diocese of Syracuse
  - Controller Catholic Schools Office
- Function as the financial liaison for the Bishop and serves on the following organization boards and committees:
  - Foundation of the Roman Catholic Diocese of Syracuse, Treasurer
  - Diocesan Cemetery Board, Treasurer
  - Syracuse Diocesan Investment Fund
  - Clerical Fund of the Roman Catholic Diocese of Syracuse
  - The Retirement Plan for secular Priests
  - St. Thomas Aquinas Fund, Inc.
  - McDevitt Foundation
  - Heritage Foundation
  - Joseph and Elaine Scuderi Foundation

- Coordinates/reports to the following committees:

  Diocesan
  1. Finance Council
  2. Audit Committee
  3. Investment & Banking Committee
  4. Priest Retirement Board
  5. Human Resources and Benefits Committee
  6. Risk Management Committee
  7. Real Estate Committee

  Foundation
  1. Executive Committee

  Diocesan Catholic Education Strategy
  1. Works closely with the School Superintendent, overseeing the Board of Trustees at the three Catholic High schools
  2. Key contributor on the Finance Council Catholic Schools Strategy committee

- Represents the Diocesan Bishop to various state and national organizations for finance officers.

- Performs all other tasks as directed by the Bishop

QUALIFICATION REQUIREMENTS: To perform this job successfully, an individual must be able to perform each essential duty satisfactorily. The requirements listed below are representative of the knowledge, skill, and experience required.

- Reasonable accommodations may be made to enable individuals with disabilities to perform the essential functions.
- Practicing Catholic committed to Mission and Teachings of the Catholic Church.
- Ability to exercise sound judgment, analytical and problem-solving skills.
- Excellent verbal and written communication skills.
- Ability to communicate complex material to a variety of organizational levels.
- Strong financial management background.
- Highest level of integrity and confidentiality.
- Strong planning orientation (strategic and operational).
- Ability to promote Diocesan Mutually Shared Vision.
- Commitment to collaboration and teamwork to the highest degree.
- Must be highly proficient with Microsoft Office Suite products and possess the ability to learn custom software programs.

EDUCATION AND/OR EXPERIENCE:

- Minimum: BS in Accounting, or at least one of MBA or CPA. Preferred: BS in Accounting and one of MBA or CPA.
- Minimum of 10 years of finance and accounting experience with at least 5 years in a progressively increasing leadership role and preferably in a not-for-profit environment.
- Familiarity with fund accounting and tax compliance.
- Administrative leadership experience, including working with consultative bodies, supervision, accounting, and investing. Experience in the Catholic Church preferred.
- Preference for candidate familiar with the Code of Canon Law related to temporal goods.

OTHER SKILLS AND ABILITIES:
A high level of organizational and interpersonal skill is required. Attention to detail and working well with others is also required.

Ability to read and analyze written and electronic correspondence and compose appropriate responses utilizing others in the organization when appropriate. Ability to respond to common inquiries from regulatory agencies or members of the business community. Ability to effectively present verbal and written information to constituencies and public groups.

APPROVED: ____

Employee Date

____

Supervisor Date