

ARCHDIOCESE OF SANFRANCISCO

CHIEF FINANCIAL OFFICER

General

- The activities of the Chief Finance Officer will be governed and directed by the particular law of the Archdiocese, applicable norms of the *Code of Canon Law*, especially *Book V: the Temporal Goods of the Church*, and the civil laws of the state and nation, insofar as these are not contrary to divine law and unless it is provided otherwise in canon law (c.22)

For the Archdiocese of San Francisco these activities include:

- Oversight of financial activities that are under the direct administration of the Archbishop, a juridic person the Archdiocese's Central Administrative Office, Cemeteries and other outside programs that report directly to the Vicar General and Moderator of the Curia (e.g., Vallombrosa, non-parish schools).
- Recommending, developing and implementing appropriate financial policies and procedures to ensure the efficient management of Archdiocesan temporal goods.
- As requested, advise the Archbishop or his designee (Vicar General & Moderator of the Curia) and the Archdiocesan Finance Council on the financial effects of existing and proposed programs/activities.
- All other duties that may be assigned by the Archbishop and/or the Vicar General & Moderator of the Curia.
- Reports directly to the Vicar General & Moderator of the Curia

Specific Duties and Responsibilities

Central Office Operations

- Primary responsibility for administration of the Archdiocese's Central Office financial activities.
- Provide direction in the preparation and presentation of the Archdiocese's Central Office financial forecasts and budgets.
- Develop and maintain the Central Office's accounting/budgetary control system and interpret the financial results against planned performance.
- Coordinate the annual Chancery audit and prepare quarterly financial statements for the Archdiocese's Central Office operations and those entities under the direct control of the Central Office.
- Coordinate the review and formal response to the auditor's annual management letter. A preliminary draft is first discussed and evaluated with the Archdiocesan Finance Council's Audit Committee.

- Assist the Vicar General & Moderator of the Curia in the preparation of the agenda and discussion materials for the monthly Finance Council meetings. Also, prepare agenda material for meetings of the Finance Council and all its sub-committees-specifically the Investment Committee, Audit Committee, Insurance Committee, Institutional Deposit and Loan Committee, Priest Retirement Board, and Pension Review Committee.
- Manage the service bureau activities for the parishes/schools e.g., Coordinated Payroll, High School Accounting programs, AAA donation program.

Archdiocesan Entities

- Develop and recommend financial plans directed toward the achievement of the Archdiocesan short-term and long-term goals and objectives.
- Plan, oversee and provide direction for the Archdiocese's Parishes Schools and other entities of the Archbishop juridic person accounting and financial systems to ensure the uniform and consistent recording and reporting of Archdiocese's financial position to multiple constituencies. This includes working with Pastors, School Principals, Agency and Department Heads and other entities of the Archbishop, juridic person entities in interpreting and applying financial and administrative policies and decisions.
- Direct the administration of all functions relating to Archdiocesan cash operations including custody of the Parishes, Schools establishment of credit and financial evaluation practices.
- Ensure compliance with financial requirements established by established laws or civil regulations, contractual agreements.
- Oversee the performance of the Archdiocesan Investment Pools by ascertaining compliance with the established investment philosophy and social responsibilities guidelines.
- Oversee the outside agency services provided to the Archdiocese by outside agencies, such as money managers, custodian bank record keeping services, investment consultants, pension consultants, etc.
- Review all Archdiocesan entities audited financial reports to ascertain the compliance by each entity with established financial policies and administrative procedures.
- Oversee the Archdiocesan insurance programs.
- Oversee the Parish Financial Review Program

External Duties and Responsibilities

- Represent the Archdiocese as the Archbishop's delegate to RETA.
- Develop a close relationship with independent auditors in order to keep abreast of the latest financial directives so that the Archdiocese is compliant with the government rules, regulations and best business practices
- Maintain strong working relationships with financial institutions to ensure that the Archdiocese has adequate equity lines available for short and long term

- funding requirements.
- Cooperate with all Archdiocesan entities and other Catholic institutions within the Archdioceses on financial and administrative matters related to the Church

Committee/Board Membership /Staff Representative Archdiocesan Finance Council

- Central Administrative Office Investment Committee
- Priest Retirement Board-staff
- Parochial Pension Review Committee Member-staff Institutional Deposit & Loan Committees-staff
- St. Patrick's Seminary Board Member-Treasurer
- St. Patrick's Seminary Finance Committee-Chair
- RETA Finance Committee
- Vallombrosa Advisory Board Member

Qualifications

- Outstanding integrity in dealing with complex financial transactions
- Excellent Managerial skills and ability to present the financial matters to management and the financial community
- Minimum education -bachelor degree in accounting or finance from an accredited college/university and possess either a Master's degree or a CPA active certificate
- Minimum of 15 years' finance experience in a for-profit or non- profit corporation with at least 10 years at a senior level Vice-President, CFO, Partner
- Must be familiar with the Catholic Church teachings and principles
- Must be an active practicing Catholic

Pay Range: \$225,000-\$275,000 annually

To Apply: submit your application, cover, and resume to Christine Escobar at the Department of Human Resources, 1 Peter Yorke Way, San Francisco, CA 94109

Statement of Non-discrimination

Pursuant to the San Francisco Fair Chance Ordinance, all employees of the Archdiocese of San Francisco shall be employed without regard to race, color, sex, ethnic or national origin and will consider for employment, qualified applicants with criminal histories.

