DIOCESE OF
KANSAS CITY-ST. JOSEPH

CHIEF FINANCIAL OFFICER

November 2, 2020

CATHOLIC RECRUITER ASSOCIATES

EXECUTIVE SEARCH • MANAGEMENT CONSULTING

BACKGROUND

The Roman Catholic Diocese of Kansas City-St. Joseph (https://kcsjcatholic.org/) serves nearly 124,000 registered Catholics and is led by Bishop James V. Johnston (Bio). The Diocese was founded on August 29, 1956, combining the Diocese of St. Joseph (founded March 3, 1868) and the Diocese of Kansas City (founded September 10, 1880). The diocese is comprised of 27 counties in the State of Missouri: Andrew, Atchison, Bates, Buchanan, Caldwell, Carroll, Cass, Clay, Clinton, Daviess, DeKalb, Gentry, Grundy, Harrison, Henry, Holt, Jackson, Johnson, Lafayette, Livingston, Mercer, Nodaway, Platte, Ray, St. Clair, Vernon, and Worth.

Position Title: Chief Finance Officer

Department: Finance and Management Services

Reports To: Bishop and Moderator of the Curia

POSITION OBJECTIVE

To provide financial expertise and advice to Bishop, Diocesan leadership, the Deposit and Loan Fund Trustees, Diocesan Finance Council, pastors, clergy, principals and other Diocesan leaders on a broad range of financial and administrative matters.

Essential Duties

To assist Diocesan 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.

- To update Diocesan Bishop regarding financial issues and related matters in a consistent and timely manner.
- To articulate the overall financial condition of the Diocese at any point in time.
- To determine creative solutions (when warranted) to unique financial challenges/matters/issues.
- To serve as primary staff person to Diocesan Finance Council.

To direct and oversee all **finance, accounting, financial reporting, treasury and investment management activities** in collaboration with Diocesan Internal Auditor and Diocesan Manager of Accounting Services.

- Direct annual budgeting process for the Chancery Operation.
- Chair the Board of Trustees of the Deposit and Loan Trust, directing and overseeing the overall process for loaning and withdrawals.
- To oversee all external financings and banking relationships.
- To oversee the annual audit process for Chancery Operation and Deposit and Loan Fund.
- To serve as the primary staff person to Diocesan Investment Committee and primary liaison to the outside Investment Consultant.

To oversee the **Diocesan Property and Casualty Insurance Program** in collaboration with Diocesan Risk Manager.

- To participate in the Litigation Management process led by In-House General Counsel.
- To assist the Diocesan Risk Manager in promoting a risk management mindset throughout the Chancery organization and in parishes and schools.

To oversee all **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 Construction Manager and the Manager of Facilities and Real Estate.

- To coordinate the overall process for new construction/major renovation.
- To facilitate property sales and purchases.
- To oversee the building operation of the Catholic Center and the NYL Building.

To assist parishes and schools in general financial matters.

- To respond to a broad range of parish and school financial and property matters.

Essential Duties cont.

To interact with key consultative boards, committees and councils.

- To serve as Chairman of the Board of Trustees of the Deposit and Loan Fund Trust and Chairman of the Lay Pension Board.
- To serve on the Diocesan Benefits Committee, Priest Pension Board, Catholic Cemeteries Board, and Diocesan Building Commission.
- To provide staff support to the Diocesan Finance Council and the Diocesan Investment Committee.
- To serve on other ad-hoc committees.

To serve as **administrative liaison to the Catholic Cemeteries, Associated Corporation**.

- To meet with Operations LLC bi-monthly.
- To coordinate the semi-annual Board of Directors meeting.

Knowledge, Skills and Abilities

- Ability to exercise sound judgment, analytical and problem-solving skills.
- Excellent verbal and written communication skills.
- 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.

Position Requirements

- Practicing Catholic committed to Mission and Teachings of the Catholic Church.
- Bachelor's Degree in Finance, Accounting or Business Management; MBA and/or CPA preferred.
- 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.
- Must be proficient with Microsoft Office Suite products and possess the ability to learn custom software programs.

Work Schedule

Work hours are irregular to a typical 8 – 5 day on occasion. Some travel (post pandemic) will be necessary when assisting parishes, schools and other diocesan agencies.

Essential Duties cont.

Direct Reports

- Manager, Risk and Internal Audit
- Construction Manager
- Facilities and Real Estate Manager
- Administrative Assistant

Education, Training and Experience

- MBA and/or current CPA credentials is required.
- Minimum of 5 years' experience with responsibilities in leadership positions in accounting and finance, with an excellent performance record.
- 5 years supervisory experience.
- Familiarity with fund accounting.
- Administrative leadership experience, preferably in the Catholic Church, including working with consultative bodies, supervision, accounting, and investing.
- Preference for candidate familiar with the Code of Canon Law related to temporal goods.

Other

Salary Commensurate with background and experience.

Application Deadline February 15, 2021

(Note: We reserve the right to shorten the deadline for applications if we have sufficient interest. Please apply early to ensure your background will be considered.)

For consideration, please email resume to:

Brent Morton
Vice President
Catholic Recruiter Associates
Brent@CatholicRecruiter.com

Note: *Only those selected for an interview with the search committee will be contacted.*

Search managed by:

CATHOLIC RECRUITER ASSOCIATES
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