



THE CATHOLIC DIOCESE
of
PENSACOLA-TALLAHASSEE



CHIEF FINANCIAL OFFICER

Diocese of Pensacola-Tallahassee
January 18, 2019

CATHOLIC RECRUITER ASSOCIATES

EXECUTIVE SEARCH • MANAGEMENT CONSULTING



CLIENT BACKGROUND

The Diocese of Pensacola-Tallahassee, founded in 1975, covers the 18 most northwestern counties of the State of Florida. Although our diocese is young, its roots go back to the first settlement of this region by Europeans, when in 1559 Don Tristan de Luna, on behalf of the Spanish crown, established the first settlement in what was to become the United States of America. The settlement was abandoned in 1561 due to hurricanes that destroyed the settlers supplies.

Our diocese enjoys the distinction of being a "dual see" diocese -- that is, it has two centers from which the Bishop governs: Pensacola and Tallahassee. Each see city has a cathedral - the Cathedral of the Sacred Heart in Pensacola and the Co-Cathedral of St. Thomas More in Tallahassee.

The Bishop of the Diocese is the Most Reverend William A. Wack, CSC ([Bishop's Biography](#)) was named as the sixth bishop of the Diocese of Pensacola-Tallahassee on May 29th, 2017 by Pope Francis and ordained and installed on August 22, 2017. Originally ordained as a priest in 1994, Bishop Wack has served in a number of pastoral assignments around the country.

Job Title: Chief Financial Officer
Directed by: The Bishop

The Chief Financial Officer is the principal advisor to the diocesan bishop in matters of finance in cooperation with the Diocesan Finance Council. The CFO is responsible for administering the temporal goods of the diocese under the authority of the Bishop, in accordance with the plan of the Diocesan Finance Council, and to make those payments from diocesan funds which the Bishop or his delegates have legitimately authorized.

Job Duties & Responsibilities

The CFO serves as a resource person to parishes in financial and related matters while evaluating, updating, and ensuring compliance of financial policies and procedures for the parishes, schools and other juridic persons under the oversight of the bishop, advancing sound practices for the care of the temporal goods of the Church.

- Act as Financial Advisor to the Bishop and other diocesan leadership.
- Analyze and make recommendations pertaining to all major financial decisions and questions facing the diocese, its parishes, schools and other external organizations.
- Serve on the Diocesan Finance Council and serve on other committees or entities as directed by the Bishop.
- Implement and evaluate financial policies and practices of the diocese to ensure that financial goals and objectives are met in accordance with Canon Law, policies established by the diocesan bishop, and government regulations.
- Oversee the planning and completion of the diocesan annual audit process in accordance with generally accepted accounting practices.
- Oversee the administrative and operational functions of the Finance, Stewardship, Property, and Construction Departments.
- Oversee planning and completion of the diocesan budget.
- Participate in administration of diocesan pension plans and employee health plan.
- Participate in the administration of risk management to include property, liability, and casualty insurance coverage.
- Ensure that all funds are properly invested and managed; evaluate investment alternatives.
- Maintain a high level of contact with constituencies across the Diocese, especially with pastors, their parish staffs and finance councils.
- Maintains all information as confidential.
- Other duties as assigned.
- The above list reflects the general details considered necessary to describe the primary functions of the job identified, and shall not be construed as a detailed description of all of the work requirements that may be inherent in the job, or assigned by the Bishop.

Qualifications

- Undergraduate degree with a preference for advanced degrees in accounting, finance or business.
- A minimum of 10 years' experience with responsibilities in leadership positions in accounting and finance, with an excellent performance record.
- Administrative leadership experience, preferably in the Catholic Church, including working with consultative bodies, supervision, accounting, investing, and borrowing.
- Advance knowledge of budgeting principles and practices (including use of spreadsheet software), accounting principles, investment, and financial reporting methodologies.
- Experience required in the following areas: property management, employee benefits and insurance.
- Preference for candidate's familiar with the Code of Canon Law related to temporal goods.
- Strong history of exceptional interpersonal skills, both with co-workers and clients.
- Excellent presentation, verbal and written communication skills.
- Practicing Catholic in good standing preferred.

Other

- Working Conditions:** The position is fulltime exempt. It will require occasional evening and weekend work and travel.
- Salary:** Salary commensurate with education and experience.
- Must meet diocesan requirements:** Criminal background check, credit check and certified in Safe Environment training provided by the Office for Safe Environment.

For consideration, please email resume to:

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