

# Job Title: Chief Financial Officer (CFO)

**Reports To:** Chief Operating Officer (COO)

**Location:** San Angelo, TX (Pastoral Center)

**Status:** Full-Time, Exempt

## Job Summary

The Chief Financial Officer (CFO) is a senior leadership position responsible for the stewardship, transparency, and strategic management of the temporal goods of the Roman Catholic Diocese of San Angelo. Reporting to the COO, the CFO oversees the fiscal health of the Chancery, its **45 parishes, and 21 missions**.

The CFO must be a collaborative leader who views financial administration as a service to the mission of the Church. The role is defined by three primary strategic mandates:

1. **Departmental Support:** Producing timely, accurate financial reporting and providing Chancery departments with the fiscal tools necessary to achieve the Bishop's pastoral goals.
2. **Parish Resource:** Implementing a centralized accounting team to support all parishes and missions.
3. **Foundation Management:** Administering the Catholic Charitable Foundation (CCF) to ensure long-term sustainability and donor intent.

## Key Responsibilities

### 1. Chancery Financial Leadership & Departmental Support

- **Mission Enablement:** Act as a proactive "team player" by providing Chancery department heads with clear, actionable financial data and budget tools to help them execute their specific ministries.
- **Timely Reporting:** Establish a rigorous schedule for the production of monthly, quarterly, and annual financial statements for the Bishop, COO, and Diocesan Finance Council.
- **Budgetary Partnership:** Facilitate a collaborative annual budget process that aligns departmental spending with the Diocese's strategic priorities.
- **Transparency:** Ensure all stakeholders have a clear understanding of the Diocese's financial position through high-quality, professional reporting.
- **Toolbox:** Maintain and update the *Diocesan Financial Policies and Procedures Manual*, serving as a living resource for best practices across the Diocese.

## 2. Parish Resource Leadership & Implementation

- **Model Design:** Build a "Parish Resource" department from the ground up to provide centralized bookkeeping, payroll, and financial oversight for parishes and missions with limited staff. Proactively develop the Diocese's capacity to serve as a primary accounting resource for parishes, recognizing the increasing challenge of recruiting qualified finance staff at the local level.
- **Tiered Support Strategy:** Lead a "Parish Resource" team designed to meet parishes and missions at their specific point of need. This includes providing high-level consultative support for parishes with competent local staff, while offering full-service centralized bookkeeping and payroll for communities unable to secure qualified personnel.
- **Standardization:** Transition all 66 entities toward a unified accounting platform (e.g., ParishSOFT) to streamline reporting and enhance internal controls.
- **Training & Mentorship:** Hire and supervise a service-oriented finance team dedicated to supporting rural West Texas communities.

## 3. Catholic Charitable Foundation (CCF) Oversight

- **Investment Management:** Serve as the primary liaison with investment advisors; monitor portfolios to ensure growth and adherence to USCCB Socially Responsible Investment guidelines.
- **Endowment Administration:** Manage the calculation and execution of annual distributions while ensuring strict compliance with donor-imposed restrictions.
- **Board Engagement:** Provide the CCF Board of Directors with accurate financial briefs and strategic counsel regarding the Foundation's assets.

## 4. Operational & Risk Management

- **Audit & Compliance:** Manage the annual external audit and ensure all tax (990-T, etc.) and regulatory filings are completed.
- **Risk & Benefits:** Oversee diocesan-wide insurance programs and the financial administration of clergy and lay benefit plans.

## Qualifications & Core Competencies

- **Education:** Bachelor's degree in Accounting or Finance; **CPA or MBA is highly preferred.**
- **Experience:** 7–10 years of progressive financial leadership. Experience in shared services, investment oversight, and multi-entity accounting is critical. Extensive experience in Fund Accounting within a non-profit or religious environment, with a proven ability to manage and report on multiple restricted, board-designated, and endowment funds while ensuring strict adherence to donor intent.
- **Change Management:** Proven ability to build new departments (Shared Services) and lead teams through technical transitions.
- **Collaborative Style:** A "servant-leader" approach with the ability to communicate complex financial concepts to clergy, lay staff, and volunteer councils with clarity and grace.
- **Communication:** Exceptional ability to present complex data to diverse audiences, from the Finance Council to rural parish volunteers.

- **Faith:** A practicing Catholic in good standing with a commitment to the mission of the Church in the Diocese of San Angelo.

## **Working Conditions**

- **Travel:** Regular travel throughout the 29 counties of the Diocese is required to build relationships with rural parishes and missions.
- **Environment:** A professional, mission-driven office environment that values collaboration, integrity, and pastoral sensitivity.