



Diocese of St. Augustine

Position Description

Position: Chief Financial Officer

Reports to: Chancellor for Administrative Affairs

Effective date: 03/30/2026

FLSA: Exempt

Grade: 212

General Summary:

The Chief Financial Officer (CFO) is the principal advisor to the bishop in matters of finance in cooperation with curia officials, the diocesan finance council, and the college of consultors. The CFO is responsible for developing and implementing financial operations and strategy to fund ministry, operations, and infrastructure needs in accordance with the priorities of the bishop and diocesan needs. This highly skilled and forward-thinking leader is responsible for ensuring that the diocese is prepared for future growth and that its entities operate with financial integrity, transparency, and accountability. The CFO ensures the establishment of sound financial controls, best practices, policies, procedures, financial systems, training, and support throughout the Diocese and its entities.

Essential Duties and Responsibilities:

- 1) Responsible for overseeing the design and operation of overall financial control policies and procedures in accordance with Canon Law and civil law, within the diocese and its various entities. Advises the bishop and diocesan leadership in matters of administration and stewardship of the temporal goods.
- 2) Performs long-range financial planning analysis, sets and reviews benchmarking metrics, and provides recommendations regarding pertinent financial implications to diocesan leadership.
- 3) Leads, in accordance with the direction of the bishop, the preparation of the annual operating and capital expenditures budgets for the curial offices, departments, and agencies of the diocese for Diocesan Finance Council review and recommendation as well as the benefit/insurance plan budget. Facilitates the ongoing monitoring of expenditures in accordance with the approved budgets.
- 4) Arranges the preparation of the annual audited financial statements for the diocese, as well as quarterly reports for the bishop, diocesan leadership, and Diocesan Finance Council. Prepares periodic reports on the financial condition of the Diocese for dissemination to the general diocesan community.
- 5) Monitors the financial status of the parishes, schools, and agencies of the diocese through a system of periodic reporting and an ongoing internal evaluation program. Apprises diocesan leadership of problem situations, presents strategies for resolving them, and carries out follow-up action as directed by the bishop or chancellor for administrative affairs, and in collegial collaboration with pastors, and other leaders. Serves as an ambassador and maintains good rapport and open communication channels with parish, school and entity leadership to ensure support, collaboration, and accompaniment. Functions as a resource to pastors and provides guidance, advice, instruction, or referral regarding diocesan policies and procedures.
- 6) Oversees diocesan investments in conjunction with the Diocesan Investment Committee, including acquisition and disposal of stocks, bonds, and real property, paying careful attention to the nature and investment objectives of the various investments managed.
- 7) Proposes investment strategies, secures professional managers, and monitors the performance of investments, and other designated funds. Communicate regularly with consultants, portfolio managers,

and the Diocesan Investment Committee. Reviews results and evaluates possible strategy changes with the Investment Committee and the bishop.

- 8) Secures financing, as required, to support approved diocesan priorities and objectives.
- 9) Secures necessary property, equipment, casualty, and liability insurance coverage for the diocese, parishes, schools, and other participating entities. Confers with brokers, third-party administrators, risk managers, and others on all insurance-related matters.
- 10) Maintains compliance with regulatory requirements by approving and filing statements and reports; filing returns; paying taxes.
- 11) Serves as primary contact person for the diocese in its relationships with commercial and investment banks, financial services providers, and certain governmental and regulatory agencies. Works closely with legal counsel on civil law matters, including litigation, human resources, addresses tax and regulatory questions, estates, and other issues and concerns affecting the diocese.
- 12) As a member of the Diocesan Curia and senior executive leadership, maintains the highest level of confidentiality and diplomacy regarding all diocesan matters.
- 13) With the help of the fiscal team (and others), creates regular learning and development opportunities such as webinars and workshops for entity personnel who carry financial, business, operational, and/or related responsibilities (in a diverse multi-cultural leadership setting). Ensures updates and issues bulletins with changes in laws and regulations.
- 14) Provides direct supervisory responsibility to the following, with indirect oversight for the entire Fiscal Services cohort (i.e., accounting, audit services, information technology, shared-accounting services, payroll, risk management, etc.):
 - Controller
 - Director of Risk Management & Information Technology
 - Senior Internal Auditor
 - Executive Director, Marywood Retreat & Conference Center
 - Executive Director, Catholic Cemeteries
 - Executive Assistant to the CFO
- 15) Serves on various boards and committees as an active member or as a resource person representing the financial interests of the diocese such as:
 - Diocesan Finance Council
 - Pension Investment Committee (chair)
 - Benefits Committee
 - Diocesan Savings and Loan
 - Catholic Foundation (ex-officio)
 - Building Committee
 - Real Estate Strategy Committee
- 16) Fosters a ministry-oriented accountable work environment, providing strong leadership, management, and supervision to her/his team. Holds regular and periodic meetings with department heads and conducts regular performance evaluations and goal setting for direct reports and fiscal services departments.
- 17) Implements and promotes the appropriate use of technology and enterprise platforms, financial management standards, consistent accounting principles and reporting, governance policies and practices in accordance with the needs and resource constraints of the Diocese.

- 18) Participates in professional gatherings, roundtables, forums, and other related activities as a senior executive level leader within the Diocesan curia.
- 19) Participates and represents the Diocese in Florida Conference of Catholic Bishops, Ecclesiastical Province and Region, United States Conference of Catholic Bishops, and national associations pertaining to finance or related areas (e.g., Bishops Insurance Committee, etc.).
- 20) Performs other related duties as assigned by the Chancellor for Administrative Affairs or the Bishop.

Knowledge, Skills, and Abilities

- Master's degree in Accounting, Finance, Business Administration, or related field is required. Certified Public Accountant is desirable.
- Practicing Catholic in good standing and registered member of a Catholic parish faith community. Must have the ability to respect, promote, accommodate, and not be in conflict with the mission, moral and social teachings, doctrines, and laws of the Roman Catholic Church. Must possess a sound working knowledge of Church hierarchy and Church structure.
- Must have at least 10 years of accounting experience; 5 years experience as Director of Accounting or equivalent, leading others, with a budget of at least \$10 million.
- At least five years of nonprofit reporting and accounting experience is preferred.
- Knowledge and training in investments, insurance, human resources, computer systems and applications, employee benefits, risk management, and operating and capital budgeting principles are highly desirable.
- Impeccable trust and honesty, and ability to handle confidential information appropriately. Must be able to maintain confidential information, exercise good judgment, and work independently as well as in a team environment.
- Strong skills in supervising, conducting effective meetings, time management, problem-solving, delegation and accountability, communication, servant leadership, technology, and multitasking.
- Strong strategic planning skills and experience in making informed decisions and actionable plans, being open to new perspectives, and being creative and willing to innovate. Ability to think strategically, anticipate future consequences and trends, and incorporate them into documented plans.
- Strong financial acumen, business acumen: review financial statements, budgets, financial metrics, data analytics, etc.
- Ability to produce concise reports, make presentations to varied groups, and be skilled at articulating financial matters to non-financial audiences.
- Proven project management skills and experience in planning, procurement, execution, and completion of projects while getting the best out of people and creating harmonious relationships within an accounting/finance team.
- Must be skilled at articulating mission and inspiring commitment to a shared vision.
- Facilitation experience and skills in conflict resolution, including active listening, communication, not placing blame, remaining calm, collaboration, and problem-solving.

- Basic knowledge of employment laws.
- Ability to respect and work with diverse cultures that make up the Church and society, and strives to celebrate commonalities and differences among various groups.
- Ability to face situations firmly, courteously, tactfully, and with respect for the rights of others; and the ability and skill to train and educate, and encourage her/his team to do the same.
- Must be able to organize and prioritize work, be proactive, take initiative, resolve complex problems, follow through, and simultaneously manage multiple priorities.
- Must be proficient in use of accounting software, along with word processing/spread sheet programs.
- Familiarity and fluency with the use of technology and the ability to know how to team with others to creatively use technology for the advancement of the office.
- Must successfully pass the required criminal background check prior to employment and maintain this clearance throughout employment.

LANGUAGE SKILLS

Ability to read, analyze, and interpret general business periodicals, professional journals, technical procedures, or governmental regulations. Ability to write reports, business correspondence, and procedure manuals. Ability to effectively present information and respond to questions from groups of managers, clients, vendors, employees, and the general public. Foreign language and/or cross-cultural competence is a plus.

MATHEMATICAL SKILLS

Ability to add, subtract, multiply, and divide in all units of measure, using whole numbers, common fractions, and decimals. Ability to compute rate, ratio, and percent and to draw and interpret bar graphs.

REASONING ABILITY

Ability to define problems, collect data, establish facts, and draw valid conclusions. Ability to interpret an extensive variety of technical instructions in mathematical or diagram form and deal with several abstract and concrete variables.

PHYSICAL DEMANDS

The physical demands described here are representative of those that must be met by an employee to successfully perform the essential functions of this position. Reasonable accommodations may be made to enable individuals with disabilities to perform the essential functions.

While performing the duties of this position, the employee is regularly required to stand; walk; sit; use hands to finger, handle, or feel; reach with hands and arms; climb or balance; stoop, kneel, crouch, or crawl; and talk or hear. The employee must regularly lift and/or move up to 25 pounds. Specific vision abilities required by this position include close vision, distance vision, and the ability to adjust focus.

WORKING CONDITIONS

The work environment characteristics described here are representative of those an employee encounters while performing the essential functions of this position. Reasonable accommodations may be made to enable individuals with disabilities to perform the essential functions.

Flexibility to work evenings and weekends, and the ability to travel and drive one's own vehicle to various diocesan locations. Ability to travel and participate in provincial, national, and occasional international business on behalf of the Diocese.

For consideration, please email resume to:

Brent Morton

Senior Vice President of Recruiting

Catholic Recruiter Associates

Brent@CatholicRecruiter.com

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

This position serves a vital religious function that supports the mission and beliefs of the Roman Catholic Church.