



## **CHIEF FINANCIAL OFFICER**

### **The Diocese:**

The Diocese of Oakland serves over 500,000 Catholics via its 82 parishes, 45 schools, and ministries throughout Alameda and Contra Costa County. The Diocesan Chancery Office, led by the Bishop, Vicar-General, Chancellor, and CFO, ensure Christ-centered leadership and stewardship benefit the faithful through delivery of the holy sacraments, faith-based ministries, and mission-driven community service across the Diocese.

### **Position Summary:**

The Chief Financial Officer is the financial leader of the Diocese and a key advisor to the Diocesan Bishop. The CFO advises him and other Diocesan leaders on strategic, operational, and tactical matters related to the financial management of the Diocese in support of the mission and goals of the Diocese. The CFO manages the Diocesan Division of Resources including treasury and cash management, investment management, credit and borrowing, accounting, financial reporting, risk management, insurance, benefits, real estate, building construction maintenance and, and internal controls for the Diocese.

### **Purpose:**

The purpose of the Diocesan Division of Resources is to (1) anticipate and respond to the resource needs of the leaders, parishes, schools, and ministries within the Diocese of Oakland; (2) foster effective collaboration, communication, and relationship with and among the priests, deacons, and lay faithful; and (3) leverage the collective gifts and talents of the local Church to help the various Diocesan entities, parishes, and schools

achieve their objectives to proclaim the Gospel in word and deed and form missionary disciples.

### **Core Values:**

The CFO and all team members serving in the Diocesan Division of Resources will give witness to the following in their daily service:

- “ **Rooted in faith:** prayerful, faithful, formed
- “ **Focused on relationship:** trustworthy, considerate, empathetic, good follow-up and follow through
- “ **Equipped to facilitate solutions:** competent, collaborative, engaging
- “ **Guided by proactive listening:** responsive, open to feedback, consistent
- “ **Animated by shared mission:** resilient, focused, passionate, joyful, bold, and humble

### **Desired Qualifications:**

#### **Education and/or Experience:**

- A bachelor's degree in business-related field, finance and/or accounting preferred
- 5-10 years of professional experience with multiple responsibilities in leadership positions
- Experience adapting to changing circumstances and leading organizational change

#### **Critical Qualifications/Skills:**

- Strong understanding of Catholic culture, structures, parish life, ministries, and roles
- Knowledge and training in accounting/financial matters and general management, especially for not-for-profit institutions
- Thorough understanding of financials, budgeting, and resource management
- Excellent prioritization and project management skills
- Demonstrated ability to develop employees and delegate effectively
- Able to diagnose problems quickly and have foresight into potential issues
- Excellent organization, communication, interpersonal and relationship management skills
- Ability to interact and influence at all levels of an organization and with multiple stakeholders
- Must be a team player and be self-motivated
- Working knowledge of Microsoft Office suite and financial management software

## Key Responsibility Areas

AREA	RESPONSIBILITIES
ADVISOR AND REPRESENTATIVE OF THE BISHOP	<ul style="list-style-type: none"> <li>• Listen, discern, and dialogue with the Bishop and Diocesan leaders concerning Diocesan-wide issues, opportunities, and plans including the Diocese's Chapter 11 reorganization and Mission Alignment Process so diverse perspectives are considered, and outcomes bear the most fruit</li> <li>• As a member of the Bishop's Leadership Team, provide financial counsel and support on whatever topics may be discussed</li> <li>• As the principle staff liaison to the Diocesan Finance Council and its committees, coordinate regular and special meetings</li> <li>• On behalf of the Bishop, respond to and seek resolution of financial and related conflicts or complaints concerning parishes, schools, and other Diocesan entities</li> <li>• Represent and support the effective implementation of the Bishop's Diocesan vision, plan, and initiatives to the clergy and lay leaders and work to ensure mutual ownership over direction and plans for the future</li> <li>• Represent the Bishop to various Diocesan entities including as a member of corporation boards</li> </ul>
FINANCIAL PLANNING AND MANAGEMENT	<ul style="list-style-type: none"> <li>• Leading the Division of Resources team:</li> <li>• Manage the ongoing financial modelling for the Diocese and the annual budgeting process in collaboration with the Diocesan Leadership Team</li> <li>• Align long-term budgetary planning and cost management with Diocesan strategy and objectives</li> <li>• Implement and evaluate Diocesan financial policies, practices, and internal controls to ensure compliance with canon law, policies established by the Bishop, and government regulations</li> <li>• Ensure financial records are maintained in accordance with GAAP and provide direction regarding accounting and financial systems to all Diocesan entities to ensure consistent, accurate, and timely reporting</li> <li>• Oversee preparation of financial statements and review the financial reporting of separately incorporated Diocesan entities. Evaluate results against plan, analyze variances, initiate corrective actions, and report results to the Bishop, Diocesan Leadership Team, and Finance Council</li> <li>• Advise the Bishop and Diocesan Finance Council on requests for loans or subsidies from parishes and schools</li> <li>• Ensure annual audits and reviews are completed for all Diocesan entities in coordination with the Diocesan Audit Committee and</li> </ul>

	<p>report results to the Bishop, Diocesan Leadership Team, and Finance Council</p> <ul style="list-style-type: none"> <li>• Recommend investment management strategies to the Bishop with the guidance of the Diocesan Finance Council and Investment Committee</li> <li>• Oversee performance of Diocesan investments and compliance with established investment policies and the Diocese's socially responsible investment guidelines</li> <li>• Manage Diocesan cash flow, oversee treasury functions, monitor all banking activities, and maintain strong working relationships with external financial institutions</li> <li>• Engage and interact with legal counsel on issues pertaining to Diocesan financial affairs</li> </ul>
INSURANCE AND BENEFITS MANAGEMENT	<ul style="list-style-type: none"> <li>• Leading the Division of Resources team:</li> <li>• Evaluate and oversee administration and modification of employee benefit programs for 3,000+ Diocesan employees, including health and retirement plan offerings</li> <li>• Coordinate and evaluate clergy retirement policies and oversee administration of Diocesan clergy retirement programs, including long term care, health plan offerings, and supplemental retirement benefits</li> <li>• Evaluate and oversee all risk management and insurance programs for the Diocese and report results and recommendations the Bishop, Diocesan Leadership Team, and Finance Council</li> </ul>
INFRASTRUCTURE OVERSIGHT	<ul style="list-style-type: none"> <li>• Leading the Division of Resources team:</li> <li>• Research, recommend, and implement Diocesan-wide systems for financial management and payroll</li> <li>• Ensure a unified vision, proper stewardship, and effective management of buildings and property throughout the Diocese</li> <li>• Provide direction, guidance, and support for all building projects</li> <li>• Establish contracts and policies for construction, purchasing, and professional services</li> <li>• Advise the Bishop on the sale or acquisition of real estate and oversee property acquisition, leasing, and dispositions</li> <li>• In consultation with the Diocesan Design Review Committee, recommend approval to the Bishop of construction and financing plans for parishes and schools in accordance with established policies</li> <li>• Engage and interact with legal counsel on issues pertaining to Diocesan contracts and real estate</li> </ul>

## **COMPENSATION AND BENEFITS**

This full-time, exempt position is classified as E-10. Salary is commensurate with experience and education with a range between \$200K - \$240K annually. Full diocesan benefits, including health, dental/vision, sick and vacation accrual, life insurance, short- and long-term disability, participation in 403B, as well as Diocesan contribution of 8% of salary into the Lay Employee Retirement Plan, among other benefits.

**Interested candidates please submit letter of interest and resume to:**

CFO Search Committee  
c/o Gloria Espinoza  
Director of Human Resources  
[gespinoza@oakdiocese.org](mailto:gespinoza@oakdiocese.org)

**Deadline to apply: November 30, 2023**