



EDSD
COURAGEOUS LOVE

Chief Financial Officer

Episcopal Diocese of San Diego

Location: San Diego, CA (Ocean Beach area)
Reports To: Canon to the Ordinary (Chief of Staff equivalency)
Direct Reports: 3 (Controller, PT Bookkeeper and PT Financial Consultant)

EDSD is an equal opportunity employer. We celebrate diversity and are committed to creating a positive and inclusive work environment for all employees. We encourage applicants of all faith backgrounds.

Our Organization

The Episcopal Church has an extremely deep historical connection to social justice. Our motto is “Courageous Love,” and we strive to express God’s love through our own love for our neighbors. It is within this tradition that we strive to build relationships across ideological, political, and socio-economic divides. Originally part of the greater Diocese of Los Angeles, the Episcopal Diocese of San Diego (EDSD) was incorporated as a new Diocese in 1974. Our team’s mission is to support our congregations and help them thrive in the communities they serve. Today our Diocese consists of 44 congregations, reaching across an extremely large and diverse area, from the coast eastward to Yuma and north to the Palm Springs and Menifee areas. With a team of 12 staff members, our organization is built on a culture of kindness, whereby we are committed to supporting each other’s humanity providing the best possible service to our parishes. Under the leadership of the Rt. Rev. Dr. Susan Brown Snook, the Diocese’s main offices are within the Episcopal Church Center in Ocean Beach.

Position Summary

The Chief Financial Officer (CFO) reports to the Canon to the Ordinary, the Diocesan equivalency to a Chief of Staff. This position will serve as a key member of our 5-person executive team and will play a role in nearly every area of the organization. The CFO oversees EDSD’s \$2.3M annual operating budget, derived from annual contributions from the congregations. As such, we are a highly service-focused organization working to support our congregations and further their impact. A significant part of the CFO’s role will be focused on advising our 44 congregations on finance and accounting matters, working directly with the volunteer treasurers, priests, and bookkeepers at each parish. Although the parishes operate independently with their own financial policies and procedures, the CFO will have some oversight responsibility for the collective budget off \$15M annually.

We seek a highly competent technical expert, who brings deep experience in nonprofit accounting. This is an extremely broad position, overseeing all financial affairs of the organization, including financial planning, budgeting and analysis, accounting, financial controls and reporting, property management and insurance. The CFO is the primary advisor and thought partner to both the Canon and the Bishop on

all financial matters, with the opportunity to help craft and implement the organization's vision, in the service of our parishes.

Short-term (year 1) priorities for this position include:

- Developing a deep understanding of our organization, with a focus on building trust and relationships with team members at all levels.
- Take ownership of financial strategy, planning, and reporting; guide decision making in ways that are fully mission-aligned.
- Partner with EDSD's two financial consultants to help them complete their work.
- Launch the 2022 budgeting process.
- Ensure individual parish audits are completed and reviewed.
- Make recommendations for optimizing financial controls and increasing automation, including implementation of a donor management software system.
- Conduct a thorough analysis of all EDSD's financial accounts to ensure we are optimizing the benefits and costs of each account.

Longer-term (years 2+) priorities for this position include:

- Continue making regular reviews of EDSD's programmatic and financial capacity.
- Develop a deep understanding of the individual congregations and their finances.
- Identify ways for EDSD and the congregations to optimize cash flow.
- Work with the Bishop and the executive staff team, along with volunteer governing board members, to implement the diocesan strategic plan.
- Select and implement a new accounting software system.

Duties & Responsibilities

- As a member of the Bishop's senior staff, participate in leadership and visioning for EDSD.
- Responsible for stewardship of all assets of the diocese, including property.
- Create and manage budgets and financial forecasts.
- Maintain proper internal controls oversee the annual audit process.
- Present monthly financial, investment and treasury reports.
- Oversee cash and investment management.
- Establish efficient records management and archiving procedures.
- Serve as the main point of contact for questions and concerns regarding property and casualty insurance and risk management.
- Oversee human resources and benefits administration; partner with EDSD's HR consultants on questions from congregations.
- Maintain knowledge of church and government policies, procedures and laws and communicate important information to the congregations as necessary.
- Serve as EDSD's primary contact with banks, investment advisors, and insurance companies.
- Work with congregations and governing bodies to obtain appropriate approvals for congregations' loans, leases, and other transactions.
- Conduct workshops for congregations on financial and business issues.
- Act as a financial consultant to congregations on reports, audits, property transactions, accounting systems, and leadership development.
- Supervise the accounting and bookkeeping staff.

Attributes & Work Style

- **Servant Leader:** Applies a can-do attitude and a customer service mindset to everything they do.
- **Compassionate:** Finds fulfillment in the nature of our work, with a commitment to social justice and progressive values.
- **Growth-oriented:** Possesses a continuous improvement lens and recognizes potential; asks thoughtful questions and offers solutions.
- **Strategic Thinker:** Intellectually curious, decisive, resourceful, and responsive, with the organizational sensitivity to gain the support and confidence from all areas of our organization.
- **Collaborative:** Works effectively with diverse personalities; a natural team player with an easy-going personality; someone who thrives inside a small, team-based work environment.
- **Analytical:** Extremely detail-oriented; someone who enjoys working with data, conducting deep analysis and spotting trends.
- **Metrics-driven:** Skilled at setting measurable, reasonable goals for financial performance and operational excellence; firm but fair, holding team members accountable for performance.
- **Planning and Process-oriented:** Exceptional mind for optimizing workflows and managing people, systems, procedures, and programs.
- **Hands-on:** Enjoys playing many roles with the ability to keep multiple projects moving forward according to shifting timelines and priorities.
- **Proactive:** Able to identify and address potential problems before they flare up.
- **Patient:** Able to work with people of all levels of financial savviness; ability to take complex financial concepts and communicate them in easy-to-understand ways.

Experience & Skillset

- 7+ years of experience in Finance and/or Accounting roles, with significant leadership and management responsibilities.
- Previous experience as the CFO, VP/Director of Finance, or Controller of a similarly sized organization.
- Deep knowledge of nonprofit finance and accounting best practices.
- Basic knowledge of California employment law.
- Robust financial management skills, including strong proficiency with assessment tools, methodologies, and metrics used to oversee organizational financial health.
- Demonstrated ability to supervise accounting functions, including internal and external audits.
- Excellent written and oral communication skills; ability to effectively present information to a wide range of stakeholders.
- Affiliation or experience with the Episcopal Church is helpful but not at all required.

For more information or to apply, please contact:

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