

Episcopal Diocese of San Diego – Chief Financial Officer

Introduction

The Episcopal Diocese of San Diego is a vibrant, welcoming community of faith, encompassing 45 congregations across Southern California and Arizona. Rooted in the Episcopal tradition, our mission is to connect an ever-growing number of people to God in Jesus Christ through discipleship, evangelism, and service. We are committed to creating a loving, inclusive community where all people are welcomed and valued. Together, we seek to strengthen our congregations, serve our neighbors, and faithfully steward the resources entrusted to us.

Position Summary

The Episcopal Diocese of San Diego seeks a collaborative, forward-thinking Chief Financial Officer (CFO) who brings both financial expertise and a commitment to supporting the mission and ministry of the Church.

Reporting directly to the Bishop and serving as a member of the Bishop's Executive Team, the CFO provides strategic leadership and oversight of the diocese's financial and administrative operations, including finance, human resources, property, insurance, risk management, technology, and governance support. The CFO also serves as Treasurer of the Diocese and Diocesan Convention.

The CFO oversees an annual operating budget of approximately \$2.8 million, a \$16 million investment portfolio, and a team of three professionals. Beyond these responsibilities, the CFO serves as a trusted advisor and resource to diocesan leadership and congregations, helping to ensure that sound financial stewardship, thoughtful planning, and effective operations support the diocese's mission and long-term vitality.

Essential Responsibilities

Executive Leadership

- Report directly to Bishop and serve as a member of the Bishop's Executive Team and principal advisor on financial, administrative, operational, human resources, property, insurance, risk management, technology, and governance matters.
- Serve as the Bishop's liaison to finance, property, budget, audit, human resources, and mission real estate committees and task forces.
- Represent the Diocese in negotiations, transactions, partnerships, and external relationships as designated by the Bishop.
- Advise congregations on finance, human resources, property, and administrative matters, drawing on a deep understanding of individual congregations and their financial capacity.

Finance, Treasury, and Governance

- Serve as chief financial advisor to the Bishop, Executive Council, Standing Committee, Diocesan Convention, and diocesan leadership.
- Direct financial operations, including budgeting, forecasting, accounting, treasury, cash management, cash-flow planning, investments, banking relationships, internal controls, audits, congregational audit guidance, financial reporting, restricted funds, grants, and loans.
- Serve as Treasurer of the Diocese and Diocesan Convention, presenting budgets, financial statements, assessments, investment reports, financial resolutions, analyses, and recommendations as required.

- Oversee diocesan approval processes, financial policies, records, reporting systems, and compliance related to loans, leases, property transactions, contracts, major commitments, accounting, tax, nonprofit, church, and civil requirements.

Strategic Plan Implementation

- Works with Bishop, executive team, and ministry leaders to implement the diocese's Strategic Plan.
- Provides executive oversight of strategic plan initiatives to increase clergy affordability and create congregational plans for strategic and secure uses of church property.
- Leads creation of budgets and financial timelines for use of funds raised and grants received for the Strategic Plan.

Mission Real Estate Oversight

- Oversight of staff, ministry team, and grant funding that supports the Diocese's work with congregations to develop real estate in ways that meet a need in the community, bring in financial resources to support the congregation, and offer a ministry opportunity for the church.

Human Resources and Benefits Administration

- Direct diocesan human resources and benefits administration, including compensation, recruitment support, employee relations, personnel policies, handbooks, payroll oversight, retirement and leave programs, and compliance with federal, state, and church requirements.
- Advise congregations on clergy and lay employment matters, compensation practices, benefits administration, human resources policies, employee engagement, leadership development, and workforce planning.

Property, Grants, Insurance, and Risk Management

- Provide executive oversight for diocesan and congregational real estate matters, including property tax exemptions and issues, leases, loan agreements, easements, development agreements, acquisitions, dispositions, and related property documents.
- Support affordable housing initiatives, capital projects, redevelopment opportunities, strategic asset management, facilities planning, mission-aligned property use, grants, restricted funds, project financing, and special initiatives.
- Oversee diocesan insurance and risk management programs, including carrier and broker relationships, coverage requirements, claims coordination, congregational guidance, compliance monitoring, and risk mitigation strategies.

Administration, Technology, and Supervision

- Oversee diocesan administrative operations, technology systems, financial and accounting systems, donor management and automation initiatives, records management, archiving, Microsoft 365, SharePoint, cybersecurity awareness, data protection, records retention, process improvement, and operational continuity.
- Serve as a resource to congregations, clergy, wardens, treasurers, vestries, and ministry leaders on finance, accounting, governance, property, human resources, insurance, compliance, stewardship, sustainability, and effective administration, including workshops and educational programs.



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- Supervise diocesan finance, human resources, administrative, and support personnel; establish departmental goals, priorities, and performance standards; and foster collaboration across diocesan ministries and departments.
- Maintain strong relationships with congregations, clergy, volunteers, diocesan staff, and external partners, and perform other duties as assigned by the Bishop.
- Supervise the work of three staff: Controller, Accountant, and Mission Real Estate Portfolio Manager.

Qualifications

- Executive-level experience in finance, administration, nonprofit management, human resources, risk management, or a related field.
- Strong knowledge of fund accounting, investments, budgeting, nonprofit governance, employment practices, and organizational leadership.
- Excellent analytical, communication, negotiation, and presentation skills.
- Ability to work effectively with bishops, clergy, governing bodies, staff, volunteers, congregational leaders, and external partners.
- Commitment to the mission and ministry of the Episcopal Diocese of San Diego; knowledge of Episcopal polity preferred.
- Experience with affordable housing development preferred.

Salary Range: \$145,000 to \$155,000

Benefits: Health Insurance, Disability, Pension Plan

Shared Appreciation Loan funding available to help with purchase of home

To Apply: Please send cover letter and resume to CFO@EDSD.org. For more information, please contact search committee chair Ms. Jan Romerdahl at JanRomerdahl@gmail.com.