



DIocese OF GREAT FALLS - BILLINGS

P.O. Box 1399 * Great Falls, Montana 59403 * (406) 727-6683

www.diocesegfb.org

Job Title: Director of Financial Services/Controller
Department: Finance
Reports To: Chief Operating Officer
FLSA Status: Exempt

Prepared By: Aubrey Rearden
Prepared Date: June 2024
Approved By: Bishop Jeffrey Fleming
Approved Date: June 2024

PURPOSE

Direct, formalize and enhance financial services and policies for the diocese, including budgeting, payroll, accounting, audit, internal reviews, cash management, investment management, clergy retirement plan, and plan property management. Directly manages accounting and financial functions at the Pastoral Center. The Director serves as staff to the Diocesan Finance Council. Fosters cooperative working relationships among Pastoral Center staff; provides highly responsible and complex professional accounting assistance and analysis to the bishop; and performs related work as required.

ESSENTIAL DUTIES & RESPONSIBILITIES

Director of Financial Services:

- Advises and directs executive management on financial and tax-based matters, developing and maintaining financial programs to facilitate attainment of Diocese of Great Falls-Billings goals in financing, investment, accounting, insurance, taxes, real estate, etc. This involves both the technical accounting functions and the more general communications and administration with the Diocese and diocesan staff.
- Oversees development of accounting procedures and methods and data processing functions including a system of internal audit and control and instruction of personnel in its operation.
- Oversees the planning and completion of the diocesan annual financial audit process in conjunction with an outside accounting firm.
- Oversees the investment of the diocesan portfolio, and deposit and loan funds.
- Handles cash flow forecasting, cash management and debt financing/management.
- Manages capital project finances and long-term investments.
- Oversee the preparation and monitoring of the annual budget; make recommendations as to available resources and financial limitations.
- Oversees and assists in all current fund activities including accounts payable, accounts receivable, loans, and deposits.
- Assists the Capital Asset Support Corporation (CASC)/Diocesan Deposit and Loan Fund.
- Review and prepare for the Bishop's approval of all repairs, renovation, and new construction projects in collaboration with the Diocesan Facility Manager.
- Provide direction and leadership for the Financial Services department personnel and their work.
- Provide necessary support to the diocesan councils including finance, pastoral, and stewardship.
- Assists the Diocesan Finance Council in performance of their duties as outlined in the by-laws of the Council and in the *Code of Canon Law*. The Council is advisory to the Bishop on overall finances and budgeting of the Diocese of Great Falls-Billings.
- Engage and interact with legal counsel on issues pertaining to diocesan financial affairs, in collaboration as needed with the Director of Human Resources.

Controller:

- Reviews day-to-day business office transactions. Serves as a resource for other employees in their accounting and bookkeeping activities.

- Provides directors at the Pastoral Center with monthly reports showing budget vs actual and research transactions when needed.
- Performs all monthly bank reconciliations.
- Oversees monthly reconciliations of general ledger accounts, and review coding of entries after posting.
- Performs monthly/quarterly ledgers close.
- Installs, modifies, documents, and coordinates implementation of accounting systems and accounting control procedures.
- Makes recommendations regarding the accounting for balance sheet and income statement accounts.
- Other duties as assigned.

LEADER COMPETENCIES

Budgets/Cost Control

Plans for and uses resources efficiently, always looks for ways to reduce costs, creates accurate and realistic budgets, tracks and adjusts budgets, contributes to budget planning.

Communication

Communicates well both in writing, creates accurate and punctual reports, delivers presentations, shares information and ideas with others, has good listening skills.

Decision Making/Judgment

Recognizes problems and responds, systematically gathers information, sorts through complex issues, seeks input from others, addresses root cause of issues, makes timely decisions, can make difficult decisions, ability to engage in healthy conflict, communicates decisions to others.

Hiring

Defines position requirements and necessary skills, recruits large applicant pool, prepares for and conducts interviews, values both experience and potential, selects appropriate candidates, builds teams with complementary skills, promotes diversity in hiring.

Managing for Results

Sets challenging and productive goals for team, keeps team accountable for actions, provides leadership and motivation, provides resources and support, uses checkpoints and data to track progress, sets up systems and processes to measure results.

Managing Performance

Applies clear and consistent performance standards, handles performance problems decisively and objectively, is direct but tactful, provides guidance and assistance to improve performance.

Planning

Develops realistic plans, sets goals, aligns plans with diocesan goals, plans for and manages resources, creates contingency plans, coordinates/cooperates with others.

Team Leadership

Anticipates and resolves conflicts, turns team diversity into an advantage, uses unique team talents, defines processes and goals, nurtures team work.

QUALIFICATIONS

To perform this job successfully, an individual must be able to perform each essential duty satisfactorily. The requirements listed below are representative of the knowledge, skill, and/or ability required. Reasonable accommodations may be made to enable individuals with disabilities to perform the essential functions.

Education and/or Experience

Minimum Requirements:

- Bachelor's degree in accounting or finance or related field. Five years professional accounting experience or an equivalent of education and experience. Experience in fund accounting required.
- Minimum of three years' experience in a supervisory role.
- Is a practicing Roman Catholic in good standing with the Church and willing to serve others in fulfilling the mission of the Diocese of Great Falls-Billings. Because of the nature of the Roman Catholic Diocese of Great Falls-Billings, the Director must be fully supportive of the magisterium of the Roman Catholic Church.
- Must be self-initiating and possess good administrative, planning and organizational skills, capable of managing multiple operations and activities at the same time.
- Is able to work effectively and responsibly with Roman Catholic ecclesial systems, and cooperatively and comfortably with all diocesan employees, priests, deacons, religious and lay people of the Diocese of Great Falls-Billings.
- Possesses good public relations skills and can communicate effectively, orally and in writing, with a variety of personalities in a positive and professional manner, especially in educational or instructional presentations (large and small groups), telephone and other person-to-person contacts.
- Possesses skills for fostering collaborative ministry and appropriate motivational and persuasive techniques to that end.
- Willing to travel frequently throughout the Diocese.
- Is available on weekends, evenings, and other extended periods as necessary to meet the demands of the position.
- *Safe Environment Training and Background Check must be completed and confirmed before employment can begin.*

Certifications, Licenses, Registrations

- Certified Public Account designation highly preferred; an appropriate combination of education and experience may be considered.

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 job. Reasonable accommodations may be made to enable individuals with disabilities to perform the essential functions.

While performing the duties of this job, the employee is frequently required to stand, walk, sit, talk and hear. The employee must occasionally lift and/or move up to 50 pounds.

Work Environment

The work environment characteristics described here are representative of those an employee encounters while performing the essential functions of this job.

This position functions in an office environment with a controlled atmosphere building. The noise level in the work environment is usually moderate.

Travel is required to visit most parishes and individuals, and to carry out programmed events, and can be extensive. Incumbent participates in annual performance appraisals and reviews of the job descriptions (both for self and direct reports).