



Manager, Finance & Operations Position Description

Reports to: Treasurer and Vice President of Finance & Operations

FLSA Status: Exempt

Approval: Daniel Cellucci

Effective Date: May 2020

Vision:

We see a world where each individual understands their God-given mission in life and is doing their best to fulfill it; a world where Catholic leaders are influential voices in society; a world where Jesus' example of loving, servant leadership is modeled in every family, workplace, parish, and community.

Purpose:

Catholic Leadership Institute (CLI) provides bishops, priests, deacons, religious, and lay persons in the Roman Catholic Church with world-class, pastoral leadership formation and consulting services that strengthen their confidence and competence in ministry, enabling them to articulate a vision for their local church, to call forth the gifts of those they lead, and to create more vibrant faith communities rooted in Jesus Christ.

Position Summary:

The Manager, Finance and Operations is responsible for assisting the Mission Implementation Team (MIT) in executing policies and procedures in support of the mission of Catholic Leadership Institute. Under the direction of the Treasurer and Vice President of Finance and Operations, s/he will:

- Manage effective and streamlined financial, operational and administrative processes, including financial, accounting, governance, human resources, and physical infrastructure
- Coordinate the understanding, awareness and development of recommended actions to ensure service capacity is optimal
- Lead and/or support financial and operational communications to the board, related committees, leadership team, and the organization at large
- Work closely with organization leaders and their teams, not only to educate them regarding finance and accounting procedures and considerations but also to explore how the finance and operations functions can support program and donor cultivation activities

This position is 30-40 hours/week and is located at the Malvern, PA office.

Desired Qualifications:

Education and/or Experience:

- Bachelor's Degree in accounting or finance. CPA and/or MBA preferred
- 5 – 7 years experience managing a full suite of financial functions, preferably in a nonprofit setting, ideally beginning in accounting and/or audit, followed by experience gathering, evaluating, presenting and reporting financial information to executive teams and external stakeholders.

Critical Qualifications/Skills:

- Experience managing the annual audit engagement
- Technology savvy with experience selecting and overseeing software installations and managing relationships with software vendors
- Advanced knowledge of QuickBooks and Raisers Edge preferred
- Working knowledge with Microsoft products required.
- Demonstrated commitment to supporting a high performing organizational climate
- Ability and desire to translate complex financial and operational concepts to individuals at all levels
- Respect for and understanding of the Roman Catholic community, parish life, and ministry
- Personal qualities of integrity and credibility; comfort with one minute in the role of being hands on/roll up your sleeves to engaging in broader conversations; mindset of leveraging the strengths of team members to maximize individual and team goals and impact
- High attention to detail
- Proven project management skills
- Client service approach to fulfilling responsibilities

Key Responsibility Areas:

<p>Financial Management</p>	<p>Organize, review and process the day to day financial requirements needed to demonstrate responsible Christian stewardship</p> <ul style="list-style-type: none"> • Coordinating with team members all activities related to invoicing, cash receipts, cash disbursements and associated allocations • Overseeing the accumulation of data, application of accounting policy/judgment and recording of all mission activities • Coordinating all annual audit activities and FORM 990 reporting • Maintaining internal controls and safeguarding of assets • Supporting the Treasurer in maintaining adequate banking relationships
<p>Decision Support</p>	<p>Evaluate, develop and analyze financial and operational information to achieve the strategic plan objectives and keep all parties aware of the financial and operational health of CLI</p> <ul style="list-style-type: none"> • Balance the organization’s current commitments against proposed service opportunities to ensure optimal resource utilization • Preparing monthly and annual financial reporting materials and metrics for all parties • Contributing information to the budgeting, cash flow and financial forecasting processes • Assisting in contribution margin and operational analysis of programs, services and donor cultivation initiatives • Coordinating data gathering, analysis and recommended actions in determining CLI’s impact
<p>Governance</p>	<p>Support, execute and monitor organizational practices so that CLI may demonstrate compliance with a diverse array of legal requirements and/or best non-profit management practices</p> <ul style="list-style-type: none"> • Monitoring of day to day activities are carried out in concert with organizational values, policies, and norms • Managing all federal and state licenses and associated filings through coordination with the organizations third party agent • Maintaining the organization’s portfolio of insurance coverages • Directing activities associated the PANO Standards of Excellence requirements

<p>Workplace Administration</p>	<p>Maintain, define and ensure a quality workplace for all CLI team members to allow for a positive culture and uninterrupted workflow</p> <ul style="list-style-type: none"> • Serving as a business partner to the MIT on the organization’s financial, budgeting, and administrative processes—including human resources, payroll and employee benefits functions—with an eye to continuously developing and improving processes • Supporting technical staff or vendors to execute a technology plan aligned with current and future needs • Overseeing CLI’s physical infrastructure and vendor relationships, (e.g. office lease, equipment, phone systems, meeting management, hospitality, supplies, etc.)
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Critical Success Criteria:

- **Self-Assurance and Humility:** Has deep trust in the Lord and in one’s ability to meet most challenges. Inspires self and others to fulfill commitments and achieve a positive outcome. Does not seek personal recognition but is committed to the success and growth of others. Makes it about the other person rather than about self. Invites others to more fully participate and open up. Understands that “I have to do it myself and I can’t do it alone.” Values excellence and is committed to lifelong growth in holiness, confidence, and competence.
- **Comfortable with Ambiguity:** Has ability to ‘go and figure it out’ when all necessary information is not available. Is willing to make quick decisions even without all the facts. Handles deviations from routine without assistance; readily accepts changes in procedures, assignments and priorities. Takes change in stride; adapts, improves and overcomes obstacles and challenges. Can balance competing priorities in assignments. Doesn’t dwell on the negative or downside of things or decisions.
- **Resilient Drive:** Has the ability and energy to do what it takes to be faithful to God’s call and to one’s unique role in service to the CLI Vision and Mission. Is motivated to achieve his/her goals and to support the goals of the organization, knowing that that will require effort, flexibility and skill. Anticipates problems and obstacles and brings resourcefulness and a “can-do-spirit” to both short and long-term goals and tasks. Finds satisfaction in the living out of one’s purpose and values and in the effort it takes to achieve one’s key responsibilities and SMART Goals. Is committed to the development and training that it will take along the way.

Application Procedure:

A complete application includes a resume and a cover letter with salary requirements describing the candidate’s reasons for considering the position and perceptions of what makes him/her a good fit. For consideration, please e-mail the cover letter and resume to: HumanResources@catholicleaders.org . Phone screenings will be made with selected candidates before face-to-face/virtual interviews.