



Vice-President, Finance

The Catholic Leadership Institute is helping the Church navigate generational shifts, responding to and preparing for ever-mounting demographic challenges among ordained religious and the laity. We accompany Catholic parishes, dioceses, and their leaders – from priests and bishops to lay leaders – by offering the benefit of world-class training and development, fresh perspectives, and intentionality.

The Role

The Vice President, Finance reports to the CEO, is a member of the leadership team and is expected to help shape the direction and culture of Catholic Leadership Institute. This role leads the continuous evaluation of short-term and long-term financial strategies to ensure the apostolate's goals are met. Additionally, this role safeguards CLI's assets and investments through the design and oversight of financial and internal controls that reflect current best practices for non-profit entities and that enable ongoing growth opportunities. This role is responsible for planning, implementing, managing, and controlling all financial-related activities of the apostolate including direct responsibility for finance, forecasting, strategic planning, accounting, payroll, risk management, contract costing, legal, and property management. This is a hybrid position, local to the Malvern, PA office.

Education and/or Experience

- Bachelor's Degree in Finance, Business or related field. CPA or MBA or Masters in Finance or Financial Analysis preferred.
- 10+ years' experience in finance and operations with demonstrated organizational leadership including managing the finances and administration of a high-growth \$8M to \$15M organization (preference given to non-profit experience).
- Experience should include legal, audit, payroll, compliance, budgeting, and investments.

Critical Qualifications/Skills

1. Demonstrated leadership in financial forecasting and modeling with proven ability to accurately assess and predict likely future outcomes.
2. Ability to communicate implications of financial data, statements, and projections to those of all levels of financial understanding.
3. Advanced knowledge of investment methodologies, financial reporting requirements, financial and accounting systems as well as budgeting principles and practices.
4. Proven resourcefulness in setting priorities, proposing new ways of creating efficiencies, and managing change in organizations and with systems.
5. Demonstrated experience creating and driving an analytic framework for planning and managing organizational change in a highly entrepreneurial organization.

6. Proven ability to play a key role in the annual strategic planning process, providing sound financial advice and suggesting ways for the apostolate to meet its financial goals.
7. Visionary leadership with the ability to positively motivate others.
8. Excellent written and verbal skills, with particular skill in using data to tell a story.
9. Practicing Roman Catholic.

Key Responsibility Areas

<p>Vision and Plan</p>	<p><i>Prayerfully discern, create, and implement a vision and plan for Catholic Leadership Institute to serve and support the leadership development needs of the Roman Catholic Church. Specifically, this includes:</i></p> <ul style="list-style-type: none"> • Maintain strong relationships with fellow members of the Leadership Team, including keeping the team updated on the short- and long-term financial implications of the ongoing and proposed business plans. • Serving as a key leader and contributor in the annual budgeting and operational planning process. • Engaging in ongoing strategic planning conversations with the Leadership Team and the Board of Directors. • Ensuring proper prioritization in key financial investments in alignment with the strategic direction of the apostolate.
<p>Finance</p>	<p><i>Develop, analyze, and report on financial strategies to fulfill the strategic direction of Catholic Leadership Institute and demonstrate responsible Christian stewardship to ministry and philanthropic partners. Specifically, this includes:</i></p> <ul style="list-style-type: none"> • Providing insight and recommendations to both short-term and long-term growth plans of the organization based on financial analysis/projections, cost identification/allocation, revenue/expense analysis, risk assessments and changes affecting the apostolate. • Evaluating and advising on the future impacts of financial standards, the launch of new products or strategies and regulatory actions. • Making business recommendations based on financial analysis and projections, cost identification and allocation, revenue/expense analysis, risk assessments and changes affecting the apostolate. • Maximizing return on investment considering both appropriate timing and risk management principles within the Investment Policy guidelines. • Budgeting, securing and allocating organization resources to achieve the operational plan objectives. • Direct the preparation of and/or prepare all financial statements, including income statements, balance sheets, shareholder reports, tax returns, projections, and governmental agency reports.
<p>People</p>	<p><i>Attract, develop, and retain the team of staff and volunteers who have the gifts, talents, and commitment to serve Christ necessary to fulfill Catholic Leadership Institute's vision and plan. Specifically, this includes:</i></p> <ul style="list-style-type: none"> • Ensuring sound financial procedures throughout the apostolate by engaging and motivating both the Leadership team and the entire mission implementation team.

	<ul style="list-style-type: none"> • Supervising the Controller, and additional part-time accounting or office management resources as needed. • Providing primary staff leadership to the Audit and Finance Committee of the Board of Directors, participating in regular meetings of the full board, and contributing to other standing or ad-hoc committees as needed.
<p>Governance and Administration</p>	<p><i>Document, assess and refine key business structures and processes across the organization to increase the effectiveness of our ministry and ensure compliance with applicable laws, policies, and regulations. Specifically, this includes:</i></p> <ul style="list-style-type: none"> • Ensuring legal and regulatory compliance regarding all financial functions, including annual audit and reporting findings to the Board. • Assessing and refining key business structures and processes across the organization to increase the effectiveness of our ministry and ensure compliance with applicable laws, policies, and regulations. • Safeguarding CLI’s assets and investments through the design and oversight of financial and internal controls that reflect current best practices for non-profit entities and that enable ongoing growth opportunities; retain relationships with outside vendors, including auditors, to assist as needed.

Does This Sound Like You? Want to Know More? We'd Love To Learn More About You!

Send us an email (JoinUs@CatholicLeaders.org) with your resume and a cover letter explaining your reasons for considering this position and why you might be the perfect fit for us and our mission.