

**Title:** Director of Finance  
**Reports To:** Congregation Operations Administrator (“COA”)  
**Direct Reports:** Accounting Manager

### **I. Summary of Position:**

Responsible for planning, directing, and coordinating the financial activities of the congregation as well as supervising and evaluating the Finance Office staff. Assists the Board of Trustees in the exercise of its fiduciary responsibilities and the Finance, Stewardship, Audit, Financial Development and Investment Committees in the exercise of their charges.

### **II. Qualifications:**

- Bachelor’s degree in Accounting, Finance or Business from an accredited institution. Master’s/advanced degree highly preferred;
- CPA designation preferred;
- Minimum of 10 years demonstrated finance operational experience including 5 years investment experience;
- Nonprofit experience preferred;
- Up to date knowledge of current financial and accounting computer applications;
- Expertise in investment portfolio management.
- Strong analytic skills and background in strategic thinking, and planning;
- Experience in leading, coaching and mentoring staff; and
- Strong written and oral communications skills, which includes experience in internal and public presentations.

### **III. Primary Duties and Responsibilities:**

#### **A. General Statement**

- Oversees long-term budgetary planning and cost management, assess organizational performance against both the annual budget and UUCSR’s long-term strategy and visioning goals, in partnership with lay staff, called ministers, and committee chairs, who are budget managers. Develop tools and systems to provide critical financial and operational information to the COA and make actionable recommendations on both strategy and operations.
- Engages the financial management committees around issues, trends and changes in the operating model(s) and operational delivery.
- Assists the financial management committees in
  - establishing yearly objectives and workplans
  - preparing meeting agendas to meet those objectives and

- selecting and engaging outside consultants (i.e. auditors, brokers, investment advisors)
- Develops financial business plans and forecasts in support of the various boards and committees.
- Assists the COA in organizational risk management.
- Monitors spending relative to our U.S. and German tax exempt status.

## **B. Specific Duties and Responsibilities**

### *i. Accounting and Finance Functions*

- Oversees financial and accounting system controls and standards as well as ensures timely financial, management and statistical reports for Board of Trustees and/or Committee use;
- Oversees all accounts, ledgers, and reporting systems, ensuring compliance with appropriate Generally Accepted Accounting Principles, regulatory requirements and congregation policies;
- Monitors integrity of accounting systems and ensures there is adequate back-up and cross-training for all accounting and business office functions;
- Develops and monitors monthly, quarterly and annual reporting and accountability practices;
- Manages interface with regulatory bodies and annual financial audits as necessary; and
- Develops tools and systems to provide critical financial and operational information to the President and Board of Trustees as well as makes actionable recommendations on both strategy and operations.
- Oversees budgeting and the implementation of budgets, in conjunction with the Finance Committee, in order to monitor progress and present financial metrics both internally and externally;
- Develops financial business plans and forecast
- Engages the committee to develop short-, medium-, and long-term financial plans and projections.
- Represents UUCSR to financial partners, including financial institutions, auditors, public officials, etc.
- Remains up to date on nonprofit audit best practices and state and federal law regarding nonprofit operations and German law regarding UUCSR's royalty holdings.
- Monitors certain restricted grants.

### *ii. Investment Functions -- With the Investment Committee*

- Reviews, observes, and monitors credit rating information of entities and compares applicable information against written investment guidelines to determine if securities traded are in compliance with written investment guidelines;

- Monitors contract compliance for investment managers, custodian banks and investment consultants;
- Evaluates the performance of various types of banking relationships and makes recommendations regarding more efficient or prudent methods; and
- Reviews, and in connection with investment advisors, makes recommendations for changes in the congregation's investment policies due to changing market conditions.

***Other Duties and Responsibilities***

- i. Responsible for development of Finance Office job descriptions for recommendation to the COA.
- ii. Supervises, evaluates and develops a Finance Office staff, managing work allocation, training, problem resolution, and performance management; and
- iii. Performs other duties as assigned.