



**Job Title:** Parish Audit Coordinator  
**Department:** Financial Services  
**Reports To:** Director of Financial Services  
**FLSA Status:** Non-exempt

**Prepared By:** Cassie Hall, HR Director  
**Prepared Date:** May 2023  
**Approved By:** Jim Carney, CFO  
**Approved Date:** May 2023

**Purpose of Position:** The Parish Audit Coordinator reports to the Director of Financial Services. This position is responsible for maintaining and continuously improving the Diocese's internal financial audit/review program, which examines the administrative records, reports, and internal controls of entities to assure compliance with accounting policies and methods and to recommend areas for improvement. The Coordinator is responsible for requesting, gathering, and organizing data from entities such as schools and parishes; collaborating with the Diocesan audit firm to analyze and interpret the data collected; and preparing written reports and recommendations.

**Essential Duties & Responsibilities:**

- Collects and organizes all information needed for high-quality financial internal reviews to help improve accounting and operating efficiency within parishes, schools, and other entities.
- With assistance from the Director of Financial Services and the Diocesan audit firm, reviews parish budgets and annual financial reports, and provides the education and follow-up needed to implement recommended changes.
- Assists locations with using financial tools for efficient financial operations.
- Regularly updates and maintains the parish accounting manual and other support materials to promote best practices and internal controls in various financial areas.
- Distributes all materials and communications to locations concerning the audit process, schedule, and procedures, providing feedback and counseling as needed.
- Travels throughout the Diocese of Helena to perform on-site audits of parishes, schools, and institutions on a rotating schedule.
- Creates audit reports identifying issues, providing suggestions, and discussion of lessons learned. Reviews with Director of Financial Services, Pastor, and parish leadership such as Finance Councils.
- Works collaboratively with location bookkeepers, office managers, and other financial staff to identify areas of concern and develop improvement plans.

**Competencies:**

**Better Health**

Develops self and others by continually improving health through all aspects of physical and mental well-being.

**Service**

Committed to customer service excellence. Is attentive to detail and accuracy and looks for improvements continuously. Monitors quality levels, finds root cause of quality problems, and owns/acts on quality problems.

**Collaboration**

Works well with others and displays team-oriented behaviors in all interactions. Actively works to create a win-win environment, and treats customers and other partners with respect.

**Innovation**

Generates new ideas and challenges the status quo. Supports change, solves problems creatively, and encourages creativity in others.

**Caring**

Demonstrates concern for others. Shows respect for our customers, coworkers, and business partners.

**Integrity**

Deals with others in a straightforward and honest manner. Is accountable for actions; maintains confidentiality, and behaves in a manner consistent with the diocesan Code of Business Ethics and Conduct.

**Adaptability/Flexibility**

Adapts to change, is open to new ideas, takes on new responsibilities, handles pressure, adjusts plans to meet changing needs.

**Communication**

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

**Job Knowledge**

Understands duties and responsibilities, has necessary job knowledge, has necessary technical skills, understands diocesan mission/values, keeps job knowledge current, is in command of critical issues.

**Problem Solving/Analysis**

Breaks down problems into smaller components, understands underlying issues, can simplify and process complex issues, understands the difference between critical details and unimportant facts.

**Productivity**

Manages a fair workload, volunteers for additional work, prioritizes tasks, develops good work procedures, manages time well, handles information flow.

**Teamwork**

Meets all deadlines and responsibilities, listens to others and values opinions, helps leader to meet goals, welcomes newcomers and promotes a team atmosphere.

**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:*

- Associate's degree with two years of administrative experience, or equivalent education/experience.
- Thorough working knowledge of Microsoft Office Suite with advanced knowledge in Excel.
- Strong interpersonal and customer service skills, including teaching, training, and mentoring.
- Is self-initiating and possesses excellent organizational skills.
- Completion of *VIRTUS Protecting God's Children* training requirements.

*Desired Qualifications:*

- Quickbooks experience
- Understanding of financial practices of parishes and schools in a Catholic context.

**Salary Range:** \$19.50-\$21 per hour, depending on experience

**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, drive, sit, talk and hear. The employee must occasionally lift and/or move up to 30 pounds.

**Work Environment:**

The work environment characteristics described here are representative of those an employee encounters while performing the essential functions of this job. Reasonable accommodations may be made to enable individuals with disabilities to perform the essential functions.

- This position generally functions in an office environment with a controlled atmosphere building. The noise level in the work environment is usually moderate.
- This position requires travel within the Diocese of Helena, so driving in a vehicle and working within the environment provided in parish and school locations is also required.

The above statements are intended to describe the general nature of the work being performed by employees in this position. They are not intended to be an exhaustive list of all duties, responsibilities, and qualifications. The Diocese of Helena reserves the right to amend and change responsibilities to meet business and organizational needs as necessary.

I am able to perform the essential functions of this position with/without accommodations.

Employee Signature: \_\_\_\_\_ Date: \_\_\_\_\_