



**Job Title:** Director of Financial Services & CFO  
**Department:** Financial Services  
**Reports To:** Bishop/Director of Center for Catholic Life  
**FLSA Status:** Exempt

**Prepared By:** Cassie Hall  
**Prepared Date:** August 2025  
**Approved By:** Bishop Vetter  
**Approved Date:** August 2025

**Purpose of Position:** The Director of Financial Services and Chief Financial Officer (CFO) is responsible for directing, formalizing, and enhancing the financial services and policies for the Diocese of Helena and its entities (parishes, schools, ministries), including budgeting, accounting, auditing, internal reviews, cash management, investment management, clergy retirement plan, insurance administration, and property management. In addition to providing general oversight of financial activities throughout the Diocese and its entities, this position directly manages the accounting and financial functions of the Roman Catholic Bishop of Helena, Montana (the Chancery).

The Director of Financial Services & CFO serves on the Diocesan Finance Council, Diocesan Building Committee, Clergy Senior Status Board, Resurrection Cemetery Association Board (Treasurer), and as a Reta Trust Member and Catholic Mutual CUP II Member. The CFO may also be invited to participate in additional diocesan entity board meeting when financial matters are being discussed, including Catholic Social Services of Montana and Montana Catholic Conference. In addition, the Director of Financial Services & CFO serves in a Canonical role as Diocesan Finance Officer, which carries a renewable five-year term contingent on retaining employment.

#### **Essential Duties & Responsibilities:**

- Advises and directs executive management on financial and tax-based matters, developing and maintaining financial programs to facilitate attainment of Diocese of Helena goals in financing, investment, accounting, insurance, taxes, real estate, etc. This work involves both the technical accounting functions and the more general communications and administration with the Diocese and diocesan staff.
- Works closely with the Bishop and Chancery Directors on all matters related to the business as part of the executive leadership team. Prepares and presents reports to the Bishop on financial matters.
- Develops and implements strategies, procedures, and business plans needed to enhance organizational growth and quality. This work may include continued efforts in legal corporate restructuring within the current Series LLC model.
- 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.
- Handles financial planning for the Diocese, which includes analyzing/developing a wide variety of financial papers, records, and reports. Handles cash flow forecasting, cash management, and debt financing/management. Manages capital project finances and long-term investments.
- Coordinates and manages overall budget process and financials for the Roman Catholic Bishop of Helena, Montana (Chancery office), Catholic Social Services of Montana (CSSM), Resurrection Cemetery Association (RCA), and various restricted funds. Oversees all operating fund activities, including accounts payable, accounts receivable, and payroll.
- Advises pastors and parish business personnel and finance councils on financial matters. Reviews and approves parish budgets and parish financial reports. Manages the parish financial audit program and audit staff. Makes referrals to parish accounting consultants and advises on parish accounting matters. Analyzes and provides counsel for savings, investments, and loans for parishes.

- Oversees the Diocesan Building Committee to review and prepare for the Bishop approval of all repair, renovation, new construction, and institutional building projects for the Diocese and its entities (parishes, schools, ministries). Facilitates contract review and approval.
- Assists parishes, schools, and entities with insurance claims, inspection requirements, risk management, and other activities related to multi-peril carrier (Catholic Mutual).
- Performs accounting and administrative functions for the plan fund of the Diocese of Helena.
- 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 Helena and includes sub-committees of Investment, Accounting, Insurance, and Building.
- At the discretion of the Bishop, following appropriate consultation, this position is appointed as the Canonical Diocesan Finance Officer.
- Reviews minutes of staffs, councils, committees, boards, and other similar diocesan groups, keeping informed of business and administrative decisions.
- 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 verbally and 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, uses consensus when possible, communicates decisions to others.

##### **Hiring**

Defines position requirements and necessary skills, recruits large applicant pool, prepares for and conducts good 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/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, works for consensus.

#### **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 Degree in Accounting or Finance or related field.
- Five years professional accounting or finance experience, or an equivalent of education and experience. Experience in fund accounting required.
- Minimum of three year's 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 Helena. Because of the nature of the Roman Catholic Diocese of Helena, the Director must be fully supportive of the magisterium of the Roman Catholic Church.
- Must be self-initiating and possesses 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 Helena.
- Possesses good public relations skills and is able to 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.
- Completion of *Protecting God's Children* Training and Virtus on-line training

**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.

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: \_\_\_\_\_