



EPISCOPAL DIOCESE OF MASSACHUSETTS

Boston, MA

CHIEF FINANCIAL OFFICER

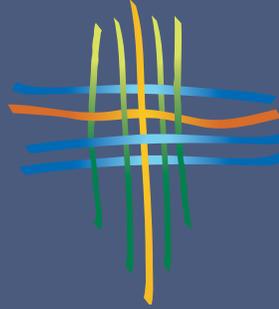
Start Date: Summer 2022

diomass.org



Carney
Sandoe
& ASSOCIATES

Episcopal Diocese of Massachusetts



Mission

Our yearnings to be disciples of Jesus, seekers of justice, and protectors of creation provide the foundation for us to do our shared work together. We will only reach these goals by becoming more completely the people Jesus calls us to be through the power of the Spirit.

First, last, and always, we pray. We ask for God's abiding presence with us and we allow the love of Jesus to transform us. From this place of unconditional grace, mercy, and love, we can trust in God's abundance, knowing we will have everything we need. We receive the courage to be agents of reconciliation and justice.

Devotion to the way of love demands vigilance, as the evil powers working to destroy the creatures of God remain unyielding in their attempts to distract us from our relationship to the Almighty. We must address the history and persistent reality of injustice in our church with honesty and humility. We must pray, learn, act, and advocate for the world we want to create.

We must be bold. We must be hopeful. We are committed to the tasks being given us by the Spirit. We trust that God is with us in the joys and challenges of this moment. We dedicate ourselves once again as the Body of Christ in this place and time to work for the glorious reign of Jesus. [Read the full mission strategy.](#)

OVERVIEW

Located on Boston Common in Downtown Crossing, the diocesan offices and Cathedral Church of St. Paul are the hub for the vibrant community of The Episcopal Church in eastern Massachusetts. The diocese serves as grantor and administrator for multiple direct service and on-the-ground programs, supporting local efforts in over 165 congregations. The diocese is led by the Rt. Rev. Alan M. Gates, Bishop Diocesan, and the Rt. Rev. Gayle E. Harris, Bishop Suffragan.



The Diocese seeks a strategic and experienced leader as its next Chief Financial Officer. This position is responsible for overseeing all financial operations of the Diocese and will play a central role in managing information technology and human resources. In addition, the new CFO will oversee the same responsibilities for the Cathedral Church of St. Paul and the Trustees of Donations, two separate legal entities.

DIOCESE HISTORY

The Episcopal Diocese of Massachusetts was organized in 1784, five years before the Episcopal Church itself. The first bishop (for New England and New York) was Samuel Seabury who was consecrated by the bishops of the Scottish Episcopal Church in 1784.

The accelerated pace of social and economic change in the late 19th century gave enormous opportunity for mission. By 1900 the church's responsibilities threatened to become unwieldy. Bishop William Lawrence pushed for the establishment of the new Diocese of Western Massachusetts in 1902, and immediately sought to unify the now compact eastern Diocese of Massachusetts in a common mission around a physical symbolic center. The vision for a cathedral church was brought to fruition in 1912, when the Cathedral Church of St. Paul in Boston was commissioned to be the "People's Church."



The diocese's 12th bishop, the Rt. Rev. John Melville Burgess, was the first African American diocesan bishop in The Episcopal Church, installed in 1970. In 1989, the diocese was the first in the Anglican Communion to consecrate a woman as a bishop; the Rt. Rev. Barbara C. Harris became bishop suffragan of the diocese in 1989.

Today, the Episcopal Diocese of Massachusetts is one of the largest dioceses in The Episcopal Church in terms of membership. It encompasses the eastern part of Massachusetts, specifically, the nine counties east and southeast of Worcester County.

COMMUNITY LIFE

The Cathedral Church of St. Paul is the symbol and center of the pastoral, liturgical, and teaching ministry of the bishops of the Diocese of Massachusetts. The cathedral church welcomes all, seeking to fulfill its mission as a house of prayer for all people in the midst of the very active life of the Diocese of Massachusetts. In addition to the cathedral's Sunday morning congregation, its ministries include The Crossing, an emergent church community of young adults that gathers on Thursday evenings; the Episcopal Chinese Boston Ministry; a Monday Lunch Program and MANNA, a ministry with the homeless community in downtown Boston with which the CFO works closely. The cathedral has an unwavering commitment to anti-racism work.



The Episcopal Diocese of Massachusetts oversees a range of programs in accordance with its mission and vision, including youth, young adult, and campus ministries; immigration and multicultural ministries; a creation care justice network; a racial justice commission; Christian formation and networking ministries; global mission; and an antiviolence campaign.

The Diocese provides fellowship gatherings four times a year for youth (junior high, high school and pre-Confirmation retreats) and oversees the Diocesan Youth Council, the youth leadership body that votes at Diocesan Convention and runs the youth retreats. The diocesan youth ministry also provides training and support for congregations and individuals who work with youth, offers a mission-focused summer pilgrimage for 9th-12th graders, and supports and runs programs through the Barbara C. Harris Camp and Conference Center in Greenfield, N.H., every summer.

B-SAFE is a summer program of St. Stephen's Youth Programs that provides a safe, fun, academically enriching environment for more than 600 elementary and middle school students at four Episcopal church and school sites in Boston. B-SAFE also offers meaningful work experience for teens and young adults hired as counselors-in-training and staff.

The Episcopal campus ministries at Boston College, Boston University, Harvard University, MIT, Northeastern, Tufts, and UMass-Dartmouth are dynamic communities that explore the intersections of vocation, justice, spirituality, and intellectual life. These open and inclusive student groups welcome everyone to join for weekly worship, community dinners, and other special events.



Life Together receives funding as a mission initiative of the Episcopal Diocese of Massachusetts. Life Together is a 10-month, full-time fellowship for emerging leaders (21-32 years old) discerning vocations in ministry, nonprofit management, and education. Life Together's purpose is to cultivate the next generation of prayerful and prophetic leaders, through spiritual practice, social justice, leadership training, and community building.

BOSTON, MASSACHUSETTS

With a population of more than 675,000, the city of Boston offers an abundance of activities and places of interest for adults and children of all ages. Boston is one of the world's premier cities, home to world-class cultural and educational resources. Boston University, Harvard, Tufts, MIT, Boston College, Berklee College of Music, Northeastern, New England Conservatory, and Wellesley College are among the area's 35 colleges and universities contributing to the area's youthfulness, vitality, and pride. Rich in history and central to the birth of our nation, Boston also gave the country its first college, secondary school, public park, subway, and periodic newspaper.

Boston is a world leader in medicine and pharmaceutical research, technology innovation, and education. Other leading cultural institutions that call Boston home include the Museum of Fine Arts, Institute of Contemporary Art, Boston Ballet, the Athenaeum, Boston Symphony and Pops, and Museum of Science. Boston is a legendary sports town, abounding in professional, collegiate, and youth teams of all varieties. A river city with a busy harbor and the adjacent Massachusetts Bay and Harbor Islands, Boston is also ideally positioned for recreation with mountains, lakes, and seacoast all within easy drive. Served by a good public transit system, Boston is an eminently walkable (and bikeable) city.



OPPORTUNITIES AND CHALLENGES

The next Chief Financial Officer of the Episcopal Diocese of Massachusetts will report directly to the bishop diocesan, the Rt. Rev. Alan M. Gates. Charged with overseeing all financial operations of the Diocese, the CFO will also play a central role in information technology and human resources. The new CFO needs to be a strategic thinker and a problem solver, dealing with complexity and historical context with any number of issues.

The successful candidate will succeed Cynthia Hallenbeck, who has served as interim CFO since 2020. The CFO oversees an operating budget of roughly \$10 million and an endowment of approximately \$90 million, which holds many funds that are restricted. The next CFO will supervise a full-time Controller, Accountants, and a Payroll and Benefits Coordinator, and collaborate with the Diocesan Treasurer, an elected, governance-related position, in meeting all accounting and finance responsibilities. Currently, additional accounting and all HR and IT services are sub-contracted out of the Business and Finance Office. In addition to Bishop Gates, the CFO will work closely with The Rev. Canon William Clay Parnell, Canon to the Ordinary, and with the interim Missioner for Property Stewardship.

The new CFO is responsible for the finances and accounting for not only the Diocese, but also for the Cathedral and for the Trustees of Donations, both separate legal entities. The Cathedral has an operating budget of \$2 million and an endowment of \$15 million, and occupies roughly 25% of the CFO's time. The Diocese leases office space from the Cathedral and bills back finance, accounting, and IT services. The Trustees of Donations manages the Diocese's endowment funds. Additionally, the CFO will provide general financial guidance and support for the 160 Episcopal-congregations in Eastern Massachusetts (the Diocese of Western Massachusetts is a separate diocese).



Key issues for the Diocese and the CFO going forward include further work on tightening processes and procedures and committing to the creation of a three- to five-year financial projection, working with a volunteer ad hoc committee that is currently exploring the overall budget taking a systems approach. This budget project is crucial to the financial sustainability of the Diocese, which can often get sidetracked by “the urgent” rather than strategically looking at its financial future. As well, the new CFO will be tasked with building a highly functioning, efficient, and effective finance team.

The new CFO must have a deep skill set and overall competency to be the key point person for the budget process and overall stewardship of the Diocese’s finances. S/he must be a true team player who believes in the Diocese’s core value of service and understands the progressive nature of its ministry. The successful candidate must have a full commitment to the mission of the Diocese and take a humble, systematic, and curious approach to the challenges at hand. In sum, the next CFO must be the ultimate multitasker, willing to -be hands-on and take on, and solve, significant challenges that demand a questioning mind.

Key Duties and Responsibilities

Diocesan Accounting and Finance

- Lead the Diocesan financial team consisting of a full-time Controller, Accountants, and Payroll and Benefits Manager, and work closely with the Diocesan Treasurer (an elected, governance-related position) in fulfilling Diocesan accounting, financial management, analysis, budgeting, forecasting, reporting, audit, and banking responsibilities.
- Serve as liaison to Diocesan churches as a resource to support financial analysis, including hosting occasional church treasurer workshops, and help resolve financial and accounting issues.

Executive Staff

- Provide ongoing, strategic counsel and guidance to the Bishop for emerging entrepreneurial opportunities as well as crisis management.
- Participate in a variety of ongoing Executive Staff meetings and Diocesan management meetings and committees.
- Prepare and deliver the Diocesan budget and forecast presentation at the annual Diocesan Convention.
- Collaborate with an outside provider in managing various human resources issues on a Diocesan level, including compliance with State and Federal HR regulations, as well as in helping to resolve HR issues on a -congregational level.
- Manage information technology generally for all three entities, working with an outside service provider.
- Work closely with the Missioner for Property Stewardship on the accounting of all real estate matters.
- Assume additional responsibilities as deemed appropriate.

DESIRED QUALITIES AND QUALIFICATIONS

- At least 10 years of experience (reflecting advancing responsibilities) in business and financial management, including budget preparations, forecast preparation, audit process, and financial reporting.
- Demonstrated skills in team building, project management, and communication.
- Ability to lead and motivate others, exhibiting an open mind in a highly dynamic evolving environment and complex business model.
- Degree required in business, accounting, or finance. Master's degree preferred.
- Experience in non-profit organizations advantageous but not required.
- Collaborative mindset.
- High emotional intelligence.
- Big picture thinker, yet detail-oriented.

TO APPLY

Interested and qualified candidates are invited to contact the consultant in confidence. Candidates will ultimately need to submit the following materials as separate PDF documents:

- A cover letter expressing their interest in this particular position.
- A current résumé.
- A list of five professional references with name, relationship, phone number, and email address of each (references will not be contacted without the candidate's permission) to:

John G. Clark

Senior Search Consultant

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