



## JOB DESCRIPTION

**JOB TITLE:** Treasurer/Chief Financial Officer      **DATE:** June 26, 2019  
**DEPARTMENT:** Administration      **REPORTS TO:** Executive Committee  
**CLASSIFICATION:** Exempt, Full-Time (SOC11-1011 AF03)

---

### POSITION SUMMARY

Support the Southern California Conference in fulfilling its vision of Embracing Community in Christ and its mission to exalt Christ by serving its diverse communities through networked and creatively engaged churches and schools. Embody the organization's values of integrity with transparency, engagement, stewardship, unity in diversity, and relationships and team. Engage in the mission of the Administrative Committee to identify, resource, coach, support, protect and hold accountable creative leaders who comprise our network.

Serve as chief financial officer for financial planning, management, procurement, and investment of Conference funds as well as act as the key business partner to executive team in the development and management of strategic plans and initiatives for the Conference.

### ESSENTIAL FUNCTIONS

1. Regular attendance.
2. Serve as chair of the Budget & Finance Committee, vice chair of Asset/Risk Management Committee and Human Resources committee, member of the Executive Committee (ExCom), Administrative Committee (AdCom), Personnel Committee, Audit Review Committee and executive officer's meetings. Preside at ExCom in the absence of the president and the executive secretary.
3. Serve on the Pacific Union workers comp board and subcommittees, Pacific Union investment Committee, Western Adventist Foundation board and other committees as assigned by ExCom.
4. Perform all duties appropriate to the treasury office consistent with the bylaws and the direction of the ExCom.
5. Assess and evaluate financial performance of the Conference with regards to its long-term operational goals, budgets and forecasts.
6. Identify, develop, and recommend analysis of financial and business initiatives.
7. Identify, acquire, and implement systems and software to provide critical financial and operational information. Evaluate departments and make suggestions for automating processes and increasing working efficiency.

8. Communicate, engage, and interact with ExCom, administration, departments, local entities and the community to draw on financial resources and goodwill for the benefit of the Conference.
9. Create and establish yearly financial objectives that align with the strategic plans.
10. Oversee and delegate as needed with the recruitment, interview and hiring of subordinate staff.
11. Provide insight and recommendations to the ExCom on investments and loans for short-term and long-range financial plans.
12. Review and ensure application of internal controls, compliance and financial procedures.
13. Prepare financial reports and ensure timeliness and accuracy of financial and management statements and reporting data for ExCom, administration, departments and external agencies as needed.
14. Supervise an executive assistant and the heads of departments in the Treasury division including Asset/Risk management, Planned Giving & Trust services, Auditing, Adventist Book Center, Information Technology and the areas of operations and maintenance.
15. Arrange for an audit of the financial records at least once each calendar year and submit an audited statement to ExCom and constituency session.
16. Serve as custodian and administrator for tithes and offerings submitted by the churches
17. Approve all banking transactions such as stocks, bonds and other negotiable papers.
18. Prepare and monitor the overall budget and ensures expenses are within the approved budget.
19. Participate with the officer group in the planning and coordination of all Conference programs, including church and company organization, ordination, and other special events.
20. Comply with policies and procedures of the Conference, including but not limited to those in the employee handbook, and the North American Division Working Policy.
21. Perform other duties as assigned.

## **REQUIRED QUALIFICATIONS**

To perform this job successfully, the individual must:

- Perform each essential duty and responsibility satisfactorily, and
- Be a member of the Seventh-day Adventist Church in good standing, and
- Possess a proven track record of effective leadership, judgment, collaboration and learning, and character above reproach, and
- Meet the requirements listed below.

### **Education and Experience**

Undergraduate college degree in accounting or finance from a recognized institution is required and a master's degree in a related field is desired. A minimum of ten (10) years of denominational, administrative and leadership experience in accounting and finance is required.

## **Competencies**

- Strategic-thinking skills.
- Results-oriented in leading and motivating others, and in setting goals.
- High level of emotional and social intelligence.
- Value teamwork.
- High level of accountability.
- Business acumen and financial management skills.
- Current on all significant aspects affecting the Conference.
- Problem-solving and analytical skills.
- Highly organized; able to prioritize, delegate, and oversee multiple projects and direct reports.
- Excellent communication skills and interpersonal skills.
- Build relationships and ability to relate to diverse peoples and cultures.
- Operational knowledge of the Seventh-day Adventist Church structure and policies.
- Ability to apply principles of accounting to install and/or maintain the operation of the Conference accounting system.
- Strong background in accounting and finance computer applications.
- Computer literacy in Microsoft Office Suite and Internet search engines.
- Discreet; able to maintain strict confidentiality of privileged information.

## **Personality Traits**

Professional, excellent work ethic, flexible, punctual, discreet, approachable, proactive, dependable.

## **Certificates, Licenses, Registrations**

Certified Managerial Accountant or Certified Public Accountant desired.

## **PHYSICAL DEMANDS**

While performing the duties of this job, the employee may be required to do the following for prolonged or significant periods: sit, stand, walk, use hands and fingers, reach with arms, talk and hear. The employee is occasionally required to climb, balance, stoop, and kneel. The employee must frequently lift and/or move up to 10 pounds and occasionally lift and/or move up to 25 pounds. Specific vision abilities required by this job include close, distant, color and peripheral vision, and the ability to adjust focus.

## **WORK ENVIRONMENT**

The noise level in the work environment is usually moderate. Extended hours and travel will be required.

Reasonable accommodations may be made to enable individuals with disabilities to perform the essential functions.