Carlisle United Methodist Church
Financial Secretary
(Date)

The vision of Carlisle United Methodist Church (CUMC) is to invite all to Live Like Jesus. The financial secretary plays a vital role in enabling the church to fulfill its mission and vision. Combining financial expertise, ethical integrity, and spiritual commitment, the Financial Secretary ensures the congregation's resources are managed responsibly, supporting the church's mission and ministry effectively. The Financial Secretary is responsible for the receipt, recording, and secure deposit of all church funds, ensuring accurate, confidential, and timely handling of offerings, gifts, and pledges.

The Financial Secretary works under the direction and supervision of the Lead Pastor. The Financial Secretary works in cooperation with all pastor(s), staff, Leadership Council, church members, and volunteers. The Financial Secretary is a part-time salaried position (10 – 15 hours per week).

Qualifications

- Experience in bookkeeping, accounting, or financial management
- Proficiency in the use of Microsoft 365 and church management programs
- Ability to maintain accurate records, reconcile accounts, prepare financial reports, and manage deposits
- Strong oral and written communication skills for communicating and reporting to church leadership, finance committees, and congregants
- Ability to handle sensitive financial information discreetly and confidentially, demonstrate ethical and Christian behavior, and maintain integrity in all financial matters
- Dependable, responsible, detail-oriented, cooperative, and able to work independently with minimal supervision
- Ability to collaborate with pastors, Finance and Give Teams, and other ministry leaders while maintaining confidentiality
- Strong leadership qualities to inspire and manage volunteer counting teams and provide instruction to ushers
- High school diploma or GED

Core Responsibilities

1. Ensure all church funds are received, deposited, and recorded according to the CUMC Finance Policy
2. Track Individual Contributions and Communicate with Donors
3. Preparing Financial Giving Reports for CUMC Leadership
4. Recruit, train and support volunteer counting teams

Job Responsibilities

1. Ensure all church funds are received, deposited, and recorded according to the CUMC Finance Policy
    a. Ensure proper procedures are in place, understood and followed for the duties of the counters, ushers, church administration, staff, and volunteers for the safe handling and safeguarding of funds.
    b. Enter contributions weekly into the church management system by member and account from envelope offerings, offering boxes, and other receipts and reconciles with the counters counting totals.
    c. Ensure funds are kept in the church safe until deposited.
    d. Ensure funds are deposited in a bank as soon as possible after they are received. Deposits should be made within three days of receipt
    e. Maintain confidentially all financial information pertaining to receiving, recording, and depositing of funds.
    f. Record funds received electronically.
    g. Provide summaries of all funds received and deposited to the bookkeeper for inclusion in the accounting system/financial statements and for reconciliation with bank statements.
    h. Post pledge information to givers' records and report overall pledged amounts and status.
    i. Maintain online giving platform
    j. Assist givers with establishing electronic giving authorizations.
    k. Perform control and balance procedures in the church management programs, including electronic receipts and givers' records.
2. Track Individual Contributions and Communicate with Donors
    a. Produce individual contribution statements of all donations received and email/mail quarterly and annually to those that contributed following IRS guidelines for non-profit organizations.
    b. Keep detailed, accurate records of all contributions, including donor names, amounts, and dates, update donor profiles in the church's management programs.
    c. Communicate with donors as needed to clarify donor intent, set up, or adjust online giving, and manage the process of giving through QCDs, IRAs, or other methods of giving.
    d. Maintains pledges by person/family in the contribution system to allow for tracking of contributions against pledge.
3. Preparing Financial Giving Reports for CUMC Leadership
    a. Prepare weekly report of funds received for Pastors, Leadership Council, Bookkeeper, and Finance Team on all funds received
    b. Prepare monthly, quarterly, and annual reports of funds received and giving units

c. Work with Give Team and Pastors to ensure communication related to new givers, large gifts, and other communication to thank, acknowledge, and grow givers.
d. Work with Pastors to identify and report changes in individual giving on a regular basis to identify individuals for follow up due to significant changes in giving.

e. Coordinate and prepare an annual congregational report on financial giving and any special reports requested by Pastors, Leadership Council, Finance or GIVE

4. Recruit, train and support volunteer counting teams
    a. Recruit, train and support counting teams that count and record offerings collected during worship services and all funds deposited in the safe.
    b. Ensure at least two unrelated members are on a team and two unrelated people are present when handling and counting funds.
    c. Ensure confidentiality of offerings
5. Additional Responsibilities
    a. Adhere to and live into the CUMC Staff Values that shape leadership culture.
    b. Attend Finance, Give, and other meetings as required.
    c. Keep financial records in good order for annual audits; ensure separation of duties between Financial Secretary and Treasurer.
    d. Dispose of records in a manner which will maintain confidentiality and protect contributor's personal identification information (PII) from identity theft
    e. Ensure compliance with church policies, guidelines, internal control policies, and applicable laws when receiving, depositing, recording, and reporting funds from all sources

This list of responsibilities is not to be considered all-inclusive. Additional responsibilities may be assigned, or current responsibilities modified by the supervisor in consultation with the Leadership Council.

I have received and understand my job description.

Date: _____

Printed First and Last Name of Employee:

_____

Signature of Employee: _____

Signature of Pastor: _____

Signature of Leadership Council, Personnel: _____