



## Canon for Finance and Administration

Episcopal Diocese of Southwest Florida / DaySpring Episcopal Conference Center

[www.episcopalswfl.org](http://www.episcopalswfl.org)

[www.dayspringfla.org](http://www.dayspringfla.org)

941-556-0315



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### Overview

The Diocese of Southwest Florida is a community of 79 congregations (including about 28,000 members), 14 Episcopal schools and the DaySpring Episcopal Conference Center. While many of our congregations dot the beach communities on the western coastline of Florida, we also serve the densely-populated Hillsborough-Pinellas County area as well as rural congregations near the center of the state. We have 5 congregations with Spanish-speaking ministries and a Lutheran/Episcopal Congregation. Our 97-acre DaySpring Episcopal Center in Parrish, FL (between Sarasota and St. Petersburg/Tampa) is a central asset for diocesan ministry. The Diocesan House/Office of the Bishop was built on the DaySpring property in 2012.

The administration of the Diocese is a shared ministry that includes elected and appointed members such as Diocesan Council (the corporate Board of the Diocese), Standing Committee and various other bodies. The Bishop's ministry is enhanced by a staff of 17. The diocesan staff is an energetic team of diverse skillsets and insights. We take pride in a culture of serving churches with transparency and open communication, embracing a collegial atmosphere of strong partnerships with lay and clergy leaders throughout the diocese.

On April 2, 2022, the Diocese will elect a Bishop Coadjutor to serve alongside and ultimately succeed Bishop Dabney T. Smith as the 6<sup>th</sup> Bishop of the Episcopal Church in Southwest Florida. We are structuring the search for a Canon for Finance and Administration to allow for the input of the new Bishop Coadjutor-elect as soon as is appropriate.

### Position Description

The Canon for Finance and Administration is an executive position, reporting to the Bishop alongside the Canon to the Ordinary. This role is responsible for the financial and administrative aspects of diocesan life as defined in the Diocesan vision and budget, including the operations of DaySpring Episcopal Center. Serving functionally as CFO/Treasurer as well as Corporate Secretary, this role is a chief coordinator of a high-functioning operational system with well-established procedures and staff cross training.

Essential responsibilities include:

- Managing the **Diocesan and DaySpring Budgets**, from the apportionment methodology to legacy endowments with fund-accounting for over 40 restricted funds, resource allocations, capital budgeting, and variance analysis.
- Managing the day-to-day **accounting functions**, including treasury management, payroll, construction, investments, fund accounting - providing financial reporting to monthly Diocesan Finance Committee/Council. Prepare for and support the annual audit.
- Managing the **human resource functions** for diocesan staff as well as required diocesan roles for clergy and lay employee benefits of the Episcopal Church via Church Pension Group affiliates. Oversight of the financial and employee benefit compliance details of new Letters of Agreement for clergy calls.
- Managing the **Diocesan Endowment Management Program** – which currently includes 37 congregations who pool their endowment funds alongside the \$17M diocesan endowment for a combined investment portfolio of \$21M.

- Managing the **Diocesan Revolving Loan Fund** – a \$7M revolving loan fund which currently includes 33 congregation loans
- Managing an engaging and attentive **support structure for the financial health and vitality of our congregations and schools** including a Diocesan Dashboard of key institutional information such as annual budgets, financials, audits, endowments, debt, human resources, and property utilization. Compiling and presenting regular summary reporting to extend best practices for health financial management at the congregation level. Intervening where necessary to assist congregations in financial distress, and inspiring positive action with opportunities and resources. *See SWFL Benchmark Report as an example - [2020 SWFL Benchmark Report](#)*
- Overseeing the production of a steady stream of **leadership development and formation program offerings** throughout the year. *See DaySpring 2022 catalog for a full overview - [2022 DaySpring Catalog](#)*
- With the Executive Director of DaySpring and Bishop’s Cabinet for DaySpring Development, manage the **strategic 10-year \$20M Master Plan for DaySpring capital development** – following the successful completion of Phase 1 and 1.5 in early 2022, we will focus on assessing the 2014 Strategic Master Plan and fundraising for future Phases 2 and 3. Serve as a champion for opportunities involving partnerships with community non-profit organizations related to DaySpring’s mission to “be a sacred place in the heart of our diocesan community that exists to enrich and empower all people in Christ”.
- With various IT vendors and staff, managing the **Information Technology systems** utilized to operate efficiently, including Microsoft OneDrive/Sharepoint cloud server; Salesforce database for communications/development; ACS OnDemand for leadership credential database; NovusAGENDA meeting management software; Zoom videoconferencing for committee, congregation leadership, and virtual Diocesan Convention meetings.

## Leadership Competencies

Our culture of servant leadership requires the following:

- **Strategic Agility:** Can anticipate future consequences and trends with broad knowledge and perspective; can articulate vision interwoven with the organization’s mission and local context, identifying possibilities and likelihoods as conditions evolve; can create creative and breakthrough strategies and plans to achieve long-term desired outcomes.
- **Business Acumen:** Demonstrates broad understanding of principles of financial management and marketing expertise necessary to achieve measurable results. Uses cost-benefit thinking to set priorities and outline cost-effective approaches. Exemplifies transparency and accountability to a well-defined framework of planning.
- **Compassionate Advisor:** An active listener and skilled communicator who can address challenges and opportunities with honest analysis and appropriate best practices; deliver advice to a wide range of leadership styles and congregation contexts.
- **Collaborative Leader:** Promotes and generates cooperation to achieve a collective outcome; is looked to for direction in a crisis; fully participates in creating a unified team that gets results.
- **Ethics and Values:** Adheres to an appropriate and effective set of core values and beliefs during both successful and challenging times; acts in line with those values and coaches accordingly.
- **Results Driven:** Can be counted on to exceed goals successfully; continually strives to achieve measurable results in a wide range of financial and operational objectives; steadfastly encourages excellence among team members and strong relationships among all stakeholders.
- **Problem Solving/Analysis:** Solves difficult problems with effective solutions; promotes the value of asking questions and sharing insights; recognizes and identifies underlying or hidden problems and patterns; leverages learnings to strengthen others.
- **Team Building:** Builds strong morale and spirit in the team; shares wins and successes; fosters open dialogue; delegates effectively; contributes to a collegial atmosphere and engaging culture of service.

## **Education and Experience**

The ideal candidate will have strong interpersonal, persuasive, written and oral communication skills. In addition, the following demonstrated education and experience are key:

- Bachelor's degree from an accredited university. Master's degree preferred. CPA preferred.
- Ten (10) + years' professional experience, with a minimum of five (5) years in a management/senior leadership capacity.
- Demonstrated ability to think and plan strategically with regard to the organization's mission and vision.
- Demonstrated capacity to build and sustain high performing work teams.
- Expert knowledge of local, state and federal regulations and requirements for business operations, including healthcare-related regulations.
- Ability to direct and oversee preparation of financial statements, budgeting, and financial forecasting in accordance with U.S. generally accepted accounting principles.
- Exhibits superb written and verbal communication and presentation skills and is able to communicate an inspiring mission and vision to the organization and community, specifically as it related to our financial position.
- Outstanding interpersonal, coaching and listening skills with the ability to communicate positively within all levels of the organization.
- Proven ability to remain objective, discrete and exercise common sense at all times. Able to develop strong, trusting relationships within the staff and leadership broadly distributed across the Church.
- Thrives in a dynamic environment and able to work on various projects simultaneously, requiring strong organizational and time management skills.
- Enthusiastic, proactive, and innovative approach to supporting our congregations and coordinating resources to meet those needs.
- Familiarity with the church organization environment, governance structures and culture (note: one does not need to be Episcopalian, but this familiarity is a careful consideration).

## **Workplace**

This is a full-time onsite position working from the Diocesan House/Office of the Bishop at the DaySpring Episcopal Center in Parrish, FL. This position reports directly to the Bishop, and along with the executive team leads a healthy mix of seasoned and energetic fresh insights among a dynamic staff.

## **Compensation**

Compensation commensurate with experience (base salary \$110,000- \$120,000) with a comprehensive benefits package including 10% employer-paid defined-contribution pension and 100% employer-paid healthcare benefits per the Episcopal Church Denominational Health Plan.

## **Timing**

Considering the integral aspect of this role and in anticipation of the election of a Bishop Coadjutor on April 2, 2022, we are starting early to attract candidates who will engage to enthusiastically and carefully discern this call.

## **How to Apply**

Please send resume and cover letter, including three references to [rnorman@episcopalswfl.org](mailto:rnorman@episcopalswfl.org). For more information, contact Canon to the Ordinary, the Rev. Canon Richard Norman at (941) 556-0315.