

CATHOLIC SCHOOLS CENTER OF EXCELLENCE

POSITION DESCRIPTION

Position Title:	CFO/Finance Director
Reports to:	President
This position is:	Full time with benefits
FLSA:	Exempt - Executive
Date:	March 2025
Hours hired to work:	40+ hours per week, 12 months

About the Catholic Schools Center of Excellence: The Catholic Schools Center of Excellence (CSCOE) is a 501(c)(3) non-profit organization that was founded in 2015. CSCOE's mission is to increase enrollment by enhancing academic excellence in preschool – 8th grade Catholic schools. When formed in 2015, CSCOE's support focused on schools within the Archdiocese of St. Paul and Minneapolis. Having demonstrated success within the archdiocese, CSCOE's focus broadened in 2022 to encompass all the preschool – 8th grade Catholic schools in Minnesota. Significant growth beyond Minnesota is projected for the future.

Purpose of Position: The Finance Director is CSCOE's Chief Financial Officer, serving as the primary financial advisor to the President and Board of Directors, maintaining financial records and ensuring that proper internal controls are in place and operating efficiently. The Finance Director also serves as an advisor to the schools we support. **To make the organization scalable to a national level, all roles within CSCOE must heavily leverage advanced technology, especially AI, to do much more for far less in the shortest amount of time possible.**

Duties and Responsibilities:

1. CORE COMPETENCY: Maintain the financial records in accordance with generally accepted accounting standards.
2. CORE COMPETENCY: Prepare and manage an annual budget that provides effective guidance to CSCOE in terms of achieving its mission with available resources.
3. CORE COMPETENCY: Report the financial position of the Organization and departments to the President and Board of Directors.
4. CORE COMPETENCY: Serve on Executive Leadership Team, providing advice and recommendations on strategic and operational plans and appropriate courses of action to achieve those plans with available resources.
5. CORE COMPETENCY: Serve as a resource on financial issues and best practices, such as budgeting, tuition management, and financial health, to schools served by CSCOE.
6. Leverage technology to a high degree, including but not limited to expertise in engineering AI prompts for maximum productivity and impact.
7. Maintain financial, accounting and internal control systems.
8. Review bank balances on a regular basis to ensure proper liquidity.
9. Prepare an annual budget and provide continuous monitoring of actual performance compared to budget, recommending adjustments as appropriate.
10. Maintain chart of accounts and general ledger.
11. Ensure all income and expenses are promptly and properly recorded in the organization's accounting records.
12. Prepare financial statements as and when appropriate for presentation to senior management and the Board of Directors.

13. Maintain bank and investment accounts and manage banking relations.
14. Reconcile bank accounts monthly.
15. Process bi-monthly payroll and maintain/process appropriate payroll records including IRS forms W-2 and 1099.
16. Maintain grant management process.
17. Manage annual audit and serve as the primary point of contact with external auditors and similar oversight and regulatory organizations.
18. Be responsible for the preparation and timely filing of the required federal and state reports including the IRS Form 990.
19. Prepare cost and financial analysis as requested by the President and/or Board of Directors.
20. Maintain human resource system, ensuring all personnel records are properly maintained.
21. Manage benefits and insurance programs.
22. Provide oversight and coordination of office infrastructure needs (e.g., leased space, technology, phone, internet, etc.).
23. Create monthly reporting so each department can more accurately track budget vs actuals
24. Accomplish other duties as may be assigned by the President.
25. Work with schools and other interested parties to develop a financial model that promotes financial health and viability within the schools.
26. Develop concepts and provide guidance in areas such as establishing tuition rates and discounting policies, procurement and capital expenditures
27. Consult with schools on economic issues and questions.
28. Assist schools, as requested, in the budgeting process and in reviewing the financial results of school operations.
29. Identify and encourage the implementation of best practices in school accounting and financial management.

Qualifications

1. Bachelor's or advanced degree in finance or accounting.
2. Certified public accountant preferred.
3. Five or more years of experience as the senior financial executive in an organization with an annual budget of at least \$2 million.
4. Demonstrated expertise with QuickBooks
5. Experienced in working in a non-profit environment and proficiency in non-profit accounting.
6. A solid understanding of proper internal controls and cash management.
7. Excellent writing, editing and verbal communications skills.
8. A sincere commitment to the mission of CSCOE and to working collaboratively with all constituent groups, including staff, board members, volunteers, donors, schools and other supporters.
9. Excellent writing, editing and verbal communication skills, including public speaking.
10. Be an entrepreneur, with the proven ability to "think outside the box" in developing unique and innovative approaches to challenging issues and situations.
11. Have a strong work ethic and set an appropriate example for team members to emulate.
12. Demonstrate the highest ethical and moral standards in personal and business conduct.

Working Conditions

CSCOE is a small, growing and entrepreneurial organization with a passion for Catholic education. We embrace a mindset of servanthood when it comes to helping schools. We listen to schools and strive to not only respond to their expressed needs but also anticipate additional needs and ask schools to seek excellence in all that they do. We seek team members who thrive in a fast-paced environment that fosters critical thinking and creative problem-solving. We are self-starters and we embrace change. We will stop at nothing to enhance excellence in our schools. Our team believes in a high level of collaboration and searches for talent who will embrace change, seek excellence, and provide leadership and inspiration for our school communities.

Application

Please send your resume, cover letter, and references to Operations Manager Breanna Walrath at breannawalrath@cscoe-mn.org.