

**Updated:** February 15, 2019  
**Title:** Chief Financial Officer  
**Staff Group:** Internal Services  
**Reports To:** President  
**Location:** Boston, Massachusetts (onsite)  
**Grade:** 18, full-time  
**Expected Start:** July 1, 2019

### **Purpose**

To ensure the effective stewardship of the Unitarian Universalist Association's (UUA) resources, including expenditure and investment of financial assets and care of physical assets, in order to advance the mission, aspiration, and values of the UUA. Oversees an annual budget of \$50 million (including UUA Health Plan) and \$600 million in assets including a \$190 million endowment, a \$360 million retirement plan, and \$45 million in outside trusts. Reports to the President, with an indirect reporting relationship to the Executive Vice President and accountability through the Board of Trustees. Serves as a key senior staff leader and member of the Leadership Council with management responsibility for financial services, facilities management, information technology services, and conference planning. Provides leadership and strategic direction for financial planning, budget preparation and control, and management of endowment and other assets.

### **Principal Responsibilities**

1. As a key senior staff member of the Association, participates in the development of the Association's goals, objectives and strategic plans to advance the mission, aspiration, and values of the UUA, and analyzes financial resources available for those ends.
2. Manages the administration of the Association's invested assets including UU Common Endowment Fund (UUCEF), the Unitarian Universalist Organizations Retirement Plan, Unitarian Universalist Organizations Health Plan, outside trusts, split interest agreements, congregational building loans and guarantees. Supports the UUA's goal of reflecting its values of social justice through Environmental, Social and Governance (ESG) evaluation in the investment process.
3. Serves as a voting member of the Investment Committee, Socially Responsible Investing Committee, Retirement Plan Committee, and the Health Plan Trust Board. Regularly communicates with investment managers, bankers, lawyers and other professional and congregational representatives.
4. Supervises the Financial Services staff group, including accounting, payroll administration, and cash management functions. Oversees the annual audit process for three legal entities: the UUA (nonprofit corporation), the UUCEF (nonprofit LLC), and the Health Plan (trust).
5. Oversees the preparation of annual budgets for the UUA's six business units: Current Operations, General Assembly, Group Insurance Plans, Beacon Press, Congregational Properties and Loan Fund, and the UUCEF. Prepares budget materials for review by senior staff and for presentation to the Board of Trustees.
6. Directs the management and strategic planning for information technology services, conference planning, and facilities management. Carries oversight responsibility for the financial management of Beacon Press, which has its own Chief Financial Officer.
7. Oversees the application process for congregations seeking building loans, guarantees and grants and makes the final determination on these awards.
8. Reports on the financial status of the Association to the Board of Trustees, to member congregations, and to the Association's annual General Assembly. Serves as liaison to the Financial Advisor, the Audit Committee, and the Association's external auditors.
9. Assumes additional responsibilities as requested by the Executive Vice President or President.

### **Qualifications**

This is an exempt Grade 18 position (salary commensurate with experience). Note that qualifications may be met as a result of lived experience, volunteer work, professional experience, and/or formal or informal training. Requirements include:

- A record as a proven and experienced financial leader and manager in a values-based or social impact setting.
- Minimum of ten years' experience as a senior level financial executive with both technical and management experience, preferably in the not-for-profit sector.
- A strong team leader and collaborator, with excellent supervision and staff management skills.

- Deep strategic and analytical capacity to lead planning around fiscal dimensions of organizational goals and operations.
- Graduate degree in business or related field expected.
- Outstanding communications skills, both written and oral.
- Knowledge of information technology.
- Proficiency in Microsoft Office applications (Excel, Outlook, PowerPoint, and Word) with especially strong Excel skills.
- Some travel required, primarily to General Assembly, President's Council, and other UU meetings.
- Knowledge of Unitarian Universalism.
- Membership in a Unitarian Universalist congregation, or willingness to become a member.
- Understanding of issues around anti-racism, anti-oppression, and multiculturalism.
- Work or lived experience with communities of color or indigenous peoples is of particular value.
- Eagerness to work in an organization in which the dismantling of white supremacy culture is a high priority.
- Comfort acting as a public leader of a faith-based institution.

### **How to Apply**

People with disabilities, people of color, indigenous people, Hispanic/Latinx, and LGBTQ candidates are encouraged to apply. The UUA is committed to developing a diverse and talented staff team. If you are excited about this role, but are unsure whether you meet 100% of the requirements, we encourage you to inquire and/or apply. Send cover letter and résumé—indicating “Chief Financial Officer” in the subject line—via e-mail to [careers@uua.org](mailto:careers@uua.org), via fax to (617) 948-6467, or to Human Resources, UUA, 24 Farnsworth Street, Boston, MA 02210. E-mail submissions preferred.

### **About the UUA**

The Unitarian Universalist Association is a progressive religious denomination headquartered in Boston's waterfront Fort Point Innovation District with offices in Washington, DC and at the United Nations in New York City. Our faith community of more than 1,000 self-governing congregations brings to the world a vision of religious freedom, tolerance, and social justice. Our normal workweek is 35 hours, we pay 80% contribution towards health insurance premiums, 11% towards retirement (after one year), and have generous paid time-off policies. We are a great place to work and we value diversity. The UUA is an Equal Opportunity Employer and is committed to the full inclusion of all. As part of this commitment, the UUA will ensure that applicants and staff with disabilities are provided reasonable accommodations. If reasonable accommodation is needed to participate in the job application or interview process, to perform essential job functions, and/or to receive other benefits and privileges of employment, please contact the Office of Human Resources at (617) 948-4648 or [humanresources@uua.org](mailto:humanresources@uua.org). For more information on the UUA, visit us online at [www.uua.org](http://www.uua.org) and [www.uuworld.org](http://www.uuworld.org).

### **Support for the Mission and Values of the Association**

The Unitarian Universalist Association is a progressive and historic religious denomination. While it is not generally required or expected that an applicant/employee identify as a Unitarian Universalist (UU) or be a member of a UU congregation in order to work at the UUA, all UUA staff members are expected to perform their job duties in accordance with the UUA's values, principles and mission. In particular the following points, drawn from the Seven UU Principles, are of particular importance for the UUA's work environment and staff culture:

- The inherent worth and dignity of every human being: We affirm the need for a human-centered workplace that allows our diverse staff to flourish. We also understand that our wider culture and society oppresses and denies human dignity, and we seek to counter the effects of that oppression in our hiring and workplace culture so that each person feels whole and valued.
- Justice, equity and compassion in human relations, and the goal of world community with peace, liberty and justice for all: We speak openly and publicly of our support for social and political issues, including LGBTQ equity, racial justice, climate justice, gender equity, and reproductive justice.
- The interdependent web of existence: We recognize that the liberation of all people is interwoven, and we work to counter patriarchy, white supremacy, colonialism, homophobia, transphobia, environmental exploitation, and other interrelated systems of marginalization.