



Canadian  
Religious  
Stewardship

Soutien aux  
religieux et  
religieuses  
du Canada

## **ASSOCIATE DIRECTOR OF FINANCE AND OPERATIONS**

If you are passionate about seniors and the frail elderly, comfortable in a Catholic environment, flexible, a collaborator, committed to compassionate service, interested in a long-term relationship and rewarding role in service to Sisters and Priests, are a Chartered Professional Accountant and have a background in accounting and financial reporting for charities, this position may be for you.

### ***I The Organization***

*Canadian Religious Stewardship (CRS)* is a not-for-profit charitable organization established by Catholic Religious Institutes from across Canada. CRS is looking for a full time Chartered Professional Accountant (CPA) to work primarily out of its Scarborough office in service to communities of Sisters and Priests in Scarborough and the Greater Toronto Area.

CRS's Mission is to serve the needs of Religious Institutes in Canada through a ministry of collaboration, in particular, their needs relating to eldercare and stewardship of resources in the midst of diminishment. CRS is a National not for profit, charitable civil corporation, and a Public Juridic Person of Pontifical Right. We serve the needs of our clients through a ministry of collaboration; empower them to view their future with hope in the midst of fewer members and diminishing resources; provide governance, management, financial and administrative expertise and services.

### ***II Job Summary***

The Associate Director of Finance and Operations is a newly created position that will report to the Director of Operations and Chief Financial Officer (CFO). He/She will work in close collaboration with existing CRS finance and operations staff, as well as with the Sisters and Priests that we serve at Presentation Manor for Seniors (PM) in Scarborough and in the Greater Toronto Area. Under the leadership of the Director of Operations and CFO, the Associate Director of Finance and Operations will be responsible for oversight of financial reporting and day-to-day financial activities. The Associate Director of Finance and Operations will cultivate a strong, trusting and transparent working relationship with existing

and new CRS clients, staff and consultants (civil and canon lawyers, auditors etc.). This position will evolve over time to meet the changing requirements of the Religious Institutes that CRS serves.

### ***III Primary Duties and Responsibilities***

#### *Leadership*

- Assist existing and new clients to identify needs and preferences for any services. This will often involve innovative tailor-made solutions to complex problems
- Provide professional advice to the CRS Leadership Team and leadership of the Religious Institutes we serve
- Foster effective teamwork between staff and clients
- Represent CRS at pertinent and related activities/events as required
- Cultivate a client centric philosophy

#### *Financial Planning and Management*

- Provide leadership, direction and monitoring of all financial and administrative functions and staff
- Review interim and year-end financial reports ensuring accuracy and relevance to needs of CRS/Client
- Oversee all external financial reporting including annual audits and reviews, coordination with external auditors and preparation of required schedules
- Oversee preparation of T3010 Registered Charity Information Returns
- Coordinate/prepare annual budgets
- Prepare multi-year financial projections including TRENDS analyses
- Ensure best practices in bookkeeping, accounting policies and procedures and records management are followed
- Ensure CRS/Client funds are administered according to approved budgets
- Approve expenditures within the authority delegated by the CRS Board and clients
- Ensure compliance with all related laws including Canada Revenue Agency and Canadian Generally Accepted Accounting Principles
- Oversee records management and all financial processes
- Review financial contracts to ensure they properly reflect the terms and expectations negotiated
- Monitor investment portfolios, associated transactions and financial reporting, ensuring CRS/Client instructions have been executed
- Monitor the status of segregated funds and provide CFO/Client with reports and recommendations

### *Operations*

- In coordination with the Director of Operations and CFO, develop and implement operations plans to address client needs and wishes
- Oversee the planning, implementation, execution and evaluation of day-to-day operations and special projects
- Ensure that the organization's pertinent files are securely stored and privacy/confidentiality is maintained
- Provide support to client leadership as requested
- Manage quality and risk
- Develop and communicate policies and procedures
- Develop and report on key performance indicators
- Work in close collaboration with the PM Executive Director, leadership and staff

### *Stakeholder and Community Relations*

- Establish exceptional working relationship with client leadership and members
- Communicate with client leadership to keep them informed of the work CRS is carrying out on their behalf
- Advocate for client
- Promote CRS to Religious Institutes and other Catholic organizations to help achieve its goals

### *Human Resources*

- Oversee Finance and Administration staff at PM as well as offsite in Greater Toronto Area
- Train and mentor staff in charity, financial and administrative policies, procedures and practices to improve performance
- Support a positive, healthy and safe work environment in accordance with all appropriate legislation and regulations
- Collaborate with the Director of Human Resources and Communications, and the Director of Operations and CFO, to develop job descriptions as necessary, and interview and select staff
- Maintain a performance management process for finance and administration staff which includes monitoring performance on an on-going basis and conducting an annual performance reviews

### *Communications & Technology*

- Ensure client has access to information and staff support with computer or other technology related issues
- Provide regular and consistent communication to support client
- Determine equipment requirements and ownership

#### *Risk Management*

- Identify and evaluate risks to people, property, finances, goodwill, and reputation
- Implement measures to control risks
- Working with the Director of Operations and CFO, ensure appropriate and adequate insurance coverage through CRASI

### ***IV Statement of Qualifications***

#### **Education**

- University degree in Business, Finance or in a related field
- Chartered Professional Accountant (CPA) designation

#### **Experience**

- Minimum seven (7) years of directly related experience in leadership
- Bookkeeping, including the oversight of multiple client files
- Conducting internal or external audits
- Detailed financial forecasting models in Excel (preferred) or other applications
- Current best practices in charity legislation and CRA requirements
- Providing recommendations and decision-making support to CFO and Board of Directors
- Successfully developing, maintaining and working collaboratively and horizontally, with multi-disciplinary and multi-area stakeholders/interest groups
- Building consensus, securing cooperation, negotiating, and implementing recommendations consistent with organizational priorities
- Change management and business optimization activities
- Researching, developing, recommending, negotiating and implementing complex projects and initiatives
- Experience in fostering a strategic vision and cultivating stakeholder relationships
- Experience in advising on problem solving and conflict resolution

#### **Knowledge**

- Mandate of CRS
- Understanding of religious persons, Religious Institutes and seniors
- Solid theoretical and practical knowledge of financial management and year-end audit procedures and reporting
- Applicable laws, CRA regulations and Accounting Standards for Not-For-Profit Organizations (ASNPO) and charities
- Spreadsheets for analysis (formulas, pivot table, macros)
- Quickbooks
- Sage Accpac/Sage 300
- Best practices

### **Skills & Abilities**

- Team player and leader for a small Finance and Operations staff team on and off site
- Promote innovation and guide change
- Achieve results
- Manage issues that are complex in nature and provide solutions that balance interests
- Identify current and future issues
- Provide broad, strategic vision but also pay attention to day-to-day detail
- Exceptional communication skills
- Excellent problem-solving capacity
- Integrity, professionalism and ethical conduct, able to handle confidential and sensitive information with discretion
- Design and implement organization-wide policies and strategies
- Foster a strategic vision and cultivating stakeholder relationships
- Organize, communicate, negotiate, resolve conflict, problem solve and make sound decisions based on consultation and best practices
- Read, interpret, apply, and transmit information concerning complex projects, agreements and contracts

### ***V Location***

The Associate Director of Finance and Operations works in community with clients and staff at Presentation Manor for Seniors in Scarborough, Ontario and in the Greater Toronto Area.

*The Associate Director of Finance and Operations must clear criminal records check with vulnerable sector screening as a condition of employment.*

*Note: This job description is intended to provide a general overview of the responsibilities and qualifications for this position. It may be subject to revisions or updates at the discretion of the organization.*