



The Episcopal Diocese of New York

Search for the Chief of Finance and Operations The Episcopal Diocese of New York New York, NY

THE SEARCH

The Episcopal Diocese of New York (EDNY/the Diocese) seeks a collaborative and strategic leader to serve as its next Chief of Finance and Operations (CF&O). A servant leader, the Chief of Finance and Operations is one of two lead staff-level positions within the Diocese and reports directly to the newly installed Bishop, Matthew F. Heyd. The CF&O serves as the chief of staff to the Diocese and will be responsible for strategically leading, planning, organizing, and executing the Diocese's widespread administrative functions.

The Episcopal Diocese of New York represents one of the longest-standing dioceses in the United States, having been founded in 1789. The Diocese covers 4,739 square miles in ten counties and three New York City boroughs. It includes 182 congregations with approximately 47,251 members from widely diverse racial, ethnic, and socioeconomic backgrounds. The clergy include 65 deacons, 482 canonically resident priests, and three bishops.

The next Chief of Finance and Operations will be a vital partner to the Bishop of New York and will be a thought leader for administrative functions across the EDNY, providing high-level leadership and modeling excellence, equity, proactivity, creativity, flexibility, and collegiality across all that they do. Involved in all central operations of the Diocese, the CF&O will be responsible for managing a \$12 million budget as well as leading operational activities including Property Services, Human Resources, Legal/Risk Management, IT, and Office Services. They will demonstrate an ability to lead high-functioning, diverse teams with trust and transparency while simultaneously working collaboratively with key groups of trustees, clergy members, and parishioners to further EDNY's strategic priorities. The ideal candidate will bring financial, administrative, and technological acumen paired with an understanding of – and appreciation for – the Episcopal Church's teaching and missions.

The Episcopal Diocese of New York has retained Isaacson, Miller, a national executive search firm, to assist in conducting this important search and to help identify outstanding candidates. All inquiries, applications, and nominations for this opportunity should be directed to the search firm as indicated at the end of this document.

THE EPISCOPAL DIOCESE OF NEW YORK

Founded in 1789, the Episcopal Diocese of New York represents one of the longest-standing dioceses in the United States. Among the Diocese's 182 congregations, 89 congregations support full-time priests, 19 congregations have more than one priest, 71 congregations have no full-time clergy, of these, 20 congregations share a priest. Information on the governance of the Diocese can be found [here](#).

The members of the expansive diocese's congregations represent the diverse local population, regularly holding services in eleven languages. The Diocese also includes a number of religious orders and Christian communities. The Diocese is home to the headquarters of The Episcopal Church and to the Church Pension Group. The oldest Episcopal seminary, General Theological Seminary, and the oldest independent seminary, Union Theological Seminary, are both located in New York City.

The Diocese supports a [wide variety of initiatives](#) and has weathered countless historical catastrophes. The Diocese was called to action following the terror attacks of 9/11, and, more recently, the Cathedral Church of St. John the Divine was on standby to become a temporary hospital in the first wave of the COVID-19 pandemic in 2020. The Bishop of New York has a role as chaplain to the world through such difficult and transformational events. Several initiatives of the Diocese include The Anti-Racism Committee and Reparations Committee, which has been working for years to educate the Diocese on systemic racism and discerning how the Church will address it; the Task Force Against Human Trafficking, which raises awareness and empowers members of the Diocese to exercise their faith through anti-trafficking efforts; and the Domestic Violence and Sexual Assault Task Force, which raises up the one in three women in our pews who are victimized, and works to equip first responders.

The Diocese is also committed to providing ministry outside of its traditional parishes. It has a strong campus ministry presence, with chaplaincies at Columbia University, New York University, the United States Military Academy (West Point), Vassar College, and other institutions, and it sponsors a Youth Conference each Summer. The Diocese is significantly involved in prison ministry, with active work in Sing Sing, Bedford Hills, and other correctional settings. The Diocese also participates in advocacy for immigrants through [Rural and Migrant Ministry](#).

LEADERSHIP

The Reverend Matthew Heyd was installed as the seventeenth Bishop of New York on February 10, 2024, after serving since his consecration in May 2023 as Bishop co-adjutor alongside the 16th Bishop, Andrew ML Dietsche. Prior to his election, he served for ten years as the tenth Rector of the Church of the Heavenly Rest in New York City. As rector, he engaged with the congregation and staff to create a "bigger table" of deep belonging and wide invitation.

Prior to his tenure at Heavenly Rest, Heyd served as Director of Faith in Action at Trinity Church Wall Street. He expanded volunteer engagement with opportunities for children in New York City, New

Orleans, Haiti, Panama, and Burundi. He supported the development of the Episcopal Service Corps, helped launch Episcopal Charities in the Diocese of New York, and served as Chief Operating Officer of a national non-profit connecting students and teachers in schools to service opportunities. Heyd worked with the family of Martin Luther King Jr. on a program to help students celebrate the King National Holiday with service.

THE ROLE: CHIEF OF FINANCE AND OPERATIONS

The next Chief of Finance and Operations will be a vital partner to the Bishop and will be a thought leader for administrative functions across the Episcopal Diocese of New York, providing high-level leadership and modeling excellence, equity, flexibility, and collegiality with the goal of promoting a congregation-focused service culture. They will demonstrate the ability to lead high-functioning, diverse teams with trust and transparency while simultaneously working collaboratively with key groups of trustees, clergy members, and parishioners to further the EDNY's mission. The successful candidate will bring financial, administrative, and technological acumen, ideally paired with an understanding of the Episcopal Church's teaching and missions.

Involved in all central operations of the Diocese, the CF&O will be responsible for managing a [\\$12 million budget](#) as well as operational activities including Property Services, Human Resources, Legal/Risk Management, IT, and Office Services and ensuring clear and effective coordination among these functions. The Diocesan staff includes 30 individuals, with the CF&O providing oversight of four direct reports: the Director of Operations and Human Resources, the Controller, the Director of Diocesan Property Services, and a part-time assistant.

The CF&O joins the Episcopal Diocese of New York at a critical and exciting time of transition. Bishop Heyd plans to utilize this moment to identify and address strategic concerns within the Diocese as well as concerns from the greater congregations across the Diocese by uniting the staff in service-centric work. The CF&O will occupy a prominent leadership role in the Diocese, representing the Diocese's interests effectively, and collaborating with peers in the business units on enterprise-level administrative issues. With average Sunday church attendance declining in recent years across various congregations within the Diocese and many parish properties needing revitalization, the CF&O will be tasked with creating new and creative revenue and budgetary pathways for the diocese, strategically prioritizing infrastructure needs and project timelines across the diocese, and providing thoughtful leadership to diocesan staff by promoting ongoing learning and development in the various departments under their purview.

The CF&O will play a leading role in the completion of the ongoing Mission Review Initiative and will foster the change that the initiative brings. The purpose of this Mission Review is to align governance structures, further clarify roles within the diocese, examine the potential for a budget restructuring, articulate a shared story focused on prayer and mutual discernment, and set priorities for the diocese for the next five years. They will utilize the Mission Review to evaluate and update critical operational and financial policies, systems, and initiatives essential to creating a sustainable business model for the Diocese.

KEY OPPORTUNITIES + CHALLENGES

The Chief of Finance and Operations will join the EDNY at a significant moment of change and evolution, presenting substantial opportunities for impact. Specifically, the CF&O will work to address the following opportunities and challenges:

- **Partner with the Bishop and EDNY Trustees to successfully advance strategic initiatives, financial planning, and vision-setting**
 - Advise the Bishop regarding proposed policy or infrastructure changes and relevant legal requirements based on the mission review initiative; on an ongoing basis, they will assess the resulting impact on the organization and its staff.
 - Harness future-forward analytical thinking and a data-driven approach to support decision-making, laying out alternatives, options, and comparisons, providing counsel about the financial impact and implications of strategic initiatives and programs, and anticipating potential issues in the near and long term.

- **Establish and prioritize a Diocesan-wide culture built around trust, transparency, and equity**
 - Establish an open and honest line of communication with the entirety of the EDNY staff to ensure needs are being heard and met in a timely manner.
 - Effectively manage relationships between departments and empower directors to make changes or other personnel decisions when necessary.
 - Connect with a diverse set of parish leaders to understand the wide variety of spiritual and functional priorities held by different congregations.

- **Support EDNY's missions and external partnerships**
 - Bring an appreciation for the complexities, constraints, and requirements associated with the mission of the Episcopal Church as both a place of religious worship and as an activist nonprofit organization.
 - Collaborate with parish leadership and the Bishop's staff to identify and initiate strategic initiatives that support the health of the diocese.

- **Advance best practices and process improvement**
 - Bring expert knowledge of and best practices in budget planning and management to steward EDNY's annual operating budget planning process and advance EDNY's fiscal health.
 - As appropriate and in collaboration with the Bishop, conduct and review internal analysis and implement potential changes related to areas including budget, culture, programs, and organizational structure.
 - Review and assess business processes, systems, and policies to identify and implement redesigns and improvements that break down silos, allowing for a more consistent,

streamlined, and modern operation, and enabling accessible and accurate information sharing.

RESPONSIBILITIES + OBJECTIVES

Finance and Accounting:

- The CF&O identifies and leads the development and implementation of cost-effective systems designed to meet the current and future needs of the Diocese.
- In partnership with the Treasurer and Controller, establishes, communicates, and implements all finance-related policies, practices, standards, and security measures.
- Works with the Bishop, Canon to the Ordinary, Diocesan Council, and Budget Committee to strategically select and assign available resources to programs/projects to support the Diocese's objectives
- Promotes the financial well-being of the Diocese by providing budget management, provides oversight of appropriate investments of temporary cash balances and the endowment, exercises executive control over budgets, and safeguards all financial assets of the Diocese.
- Strategically partners with and leads the Controller function to minimize institutional liability in financial operations by ensuring that effective internal controls are in place and in compliance with GAAP and applicable federal, state, and local regulatory laws and rules for financial and tax reporting.
- Coordinates and fosters relationships with key stakeholders and related organizations such as the Church Pension Group and Diocesan Investment Trust.
- Partners with the Controller to oversee accounts receivable, accounts payable, and cash flow management.

Property Support:

- Collaborates closely with the Bishop, the Bishop's Executive Team, the Standing Committee, the Diocesan Trustees, and other senior staff members on various real estate and property development transactions.
- Establishes high-level prioritization guidelines for the completion of infrastructure projects across the Diocese – home to over 180 churches and a variety of auxiliary buildings.
- Fosters relationships with parish leadership to deeply understand the broad property management themes that the Diocese must address for the immediate and long term.

Operations and Human Resources:

- Reviews and approves all hiring procedures, professional development opportunities, and performance review policies for the Bishop's staff in partnership with the Director of Operations and HR.
- In partnership with Canon to the Ordinary, works with the Bishop on Board matters.
- Identifies prospective committee members and trustees for Bishop's appointment and serves as secretary to the trustees per the canons.

- Supports IT-related issues, including the analysis of current technology infrastructure. Recommends improvements and/or the development and implementation of legally compliant policies relating to IT and cyber security in partnership with the Managed Services Provider.
- Ensures any/all legal agreements are reviewed in a timely manner.
- Implements appropriate risk management policies.

DESIRED QUALIFICATIONS + CHARACTERISTICS

- A bachelor's degree, preferably in finance, accounting, business management, administration, or a related field, is required. A master's degree is strongly preferred. At least 15+ years of progressively responsible financial and business operations experience, preferably in a large, complex, decentralized nonprofit organization.
- As a servant leader, demonstrated ability to inspire trust and work collegially with leadership, trustees, staff, clergy, parishioners, and business partners. Demonstrated strategic leadership, planning, change management, project management, and process improvement skills.
- Demonstrated ability to achieve consensus and influence a wide range of people at various levels and from diverse cultural backgrounds to achieve results in a collaborative decision-making environment.
- Strong supervisory abilities and proven experience in managing and developing high-performing teams.
- Ability to analyze data for budgeting, operations, auditing, accounts receivable, and reserve analysis.
- Extraordinary attention to detail and accuracy.
- Unquestionable integrity, strong work ethic, and resiliency are required.
- Demonstrated commitment to diversity and inclusion, and ability to attract and lead a diverse workforce.
- Excellent verbal and written communication skills and strong relationship skills, with a focus on interdepartmental communication.
- Property management experience preferred.
- Familiarity with the Episcopal Church preferred.
- Full-time, in-person commitment required.
- A sense of humor.

APPLICATIONS, NOMINATIONS, AND INQUIRIES

Confidential inquiries, nominations/referrals, and applications (including resumes and letters of interest responding to the opportunities and challenges outlined above) should be sent electronically to the Isaacson, Miller executive search team via the link below.

Phillip Petree, Partner
Isaacson, Miller

<https://www.imsearch.com/open-searches/episcopal-diocese-new-york/chief-finance-operations>

The Episcopal Diocese of New York is committed to recruiting, supporting, and fostering a diverse community of outstanding staff. As such, The Episcopal Diocese of New York does not discriminate on the basis of sex, gender, marital status, pregnancy, race, color, ethnicity, national origin, disability, religion, sexual orientation, gender identity or expression, veteran status, or other legally protected characteristics with regard to employment.