January 2026

**FINANCE DIRECTOR POSITION DESCRIPTION**

**Purpose of Position:**
To maintain a healthy fiscal climate and to bring a fiscal voice to the Board. The Finance Director is in charge of developing and administering the financial program of the church. The Finance Director, working with a Board appointed Treasurer, supervises the expenditure of church monies and provides for the written accounting of all the financial transactions of the church. They keep informed of the financial condition of the church, report to the Board and the Congregation, and ensure that financial forecasts are prepared as needed.

**Term of Office:**
Elected at Annual Congregational Meeting, term starting July 1 for three years.

**Responsibilities:**
- Attend one to two board meetings per month and additional meetings as necessary, for budget development or other topics. Board meetings are generally held online.
- Attend full-day board retreat at beginning of church year for team building and development of board goals.
- Chair Finance Advisory meetings quarterly or as needed; these are gatherings of those responsible for all matters concerning church finances and include representatives from fundraising, annual pledge campaign, general stewardship, plate counting, etc.
- Serve as Board liaison for Treasurer, Fund Trustees, Stewardship & Pledge Team, Fund Raising, Sunday counters, Property Team and Building & Grounds Team.
- Collaborate with the Treasurer and Board regarding the annual budget planning process.
- Work with the Treasurer, Financial Secretary, and church employees to maintain financial records.
- Ensure that financial reports are prepared by the Treasurer and presented at the monthly Board meetings and at the Annual Congregational Meeting.
- Communicate with the congregation regarding fiscal issues.
- Serve as a Member of Fund Trustees.
- Review and grant final approval of Requests for Funds (RFFs).
- Serve as an authorized signer on all financial accounts for the Church.
- Assist as needed to ensure that various administrative / financial activities such as employee benefits review, insurance coverage, and improved financial processes are addressed.
- Participate actively in the discussion and decision-making processes of the board.
- Conduct this ministry in concert with the Treasurer, Board and Minister.

**Gifts Required:**
- Patience
- Organization
- Planning
- People Skills

- Reliable and consistent availability and focus

**Amount of Time Required:** 5 to 6 hours per week. Additional time needed for periodic projects and organizational activities

**When Ministry is Performed:** Year-round. Weekly: for expenditure approvals (RFF's) and check/payment approvals. January: administrative processes related to annual benefit updates and annual UUA congregational survey. Spring: budgeting. As needed for financial-focused issues.

**Training Provided:** Mentoring available from prior Finance Directors and Treasurer. UUA resources on leadership and board development and various resources from the UUA Church Finances office.

**Responsible to:** Board and Congregation

**Support Provided by:**
- Treasurer, Financial Secretary, Pledge Chair, Fundraising Chair or Auction Chair, and others as invited.
- Other Board members
- Office Administrator and Bookkeeper
- President & Vice President as back-up approvers for RFFs

**Last revised:** January 2026