



LEADERSHIP PROFILE

Treasurer/Chief Financial Officer

**North Georgia Conference of the
United Methodist Church (NGUMC)**

Atlanta, GA

"Open hearts. Open minds. Open doors."

A Compelling Opportunity

The North Georgia Conference of the United Methodist Church (NGUMC) is the largest U.S. regional body of the United Methodist Church (UMC). Comprised of nearly 800 churches, over 1,300 clergy members, and approximately 340,000 lay members, the North Georgia Conference is headquartered in Atlanta and overseen by Resident Bishop Sue Hauptert-Johnson.

Globally, the United Methodist Church has 11 million members. A hallmark of the UMC is active engagement with the world, consistent with the teachings of John Wesley, who placed primary emphasis on Christian living and putting faith and love into action.

Keith Cox, Treasurer and Director of Administrative Services, will retire in June after two decades of exemplary service. The position is being renamed Treasurer/Chief Financial Officer (CFO).

The North Georgia Conference is in a strong financial position. The Conference, with an annual \$17 million budget, has been managing effectively through challenges that include the pandemic, the declines in mainstream religions, and uncertainties in the denomination caused by divisions around LGBTQ ordination and potential disaffiliations.

The new CFO is called to this important organization to help lead change and innovation. The CFO will be a source of financial acumen, vision, strategy and creativity; a builder of trust and relationships; and a team player with passion for supporting UMC mission, churches and other entities across North Georgia.



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Mandate for the Treasurer/ CFO

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The Treasurer and Chief Financial Officer (CFO) will have financial and operational acumen, and a heart for the mission of the UMC. The CFO

will be an inspiring, big-picture leader with strong relational skills. The CFO will engage and build trust, serving the Church, clergy and members in diverse urban, rural and suburban communities of all types and sizes across North Georgia.

Reporting to Council of Finance & Administration (CFA), the CFO will:

- 1. Be a forward-looking, strategic, 'go-to' leader.** The CFO will play a central role in the success of the North Georgia Conference, as a big-picture leader, financial strategist and innovator. The CFO will engage with all entities of the NGUMC and its constituencies as a valued partner, thought leader and source of knowledge and ideas, solutions and answers, trust and transparency. The CFO will be a source of inspiration, cohesion, and support for UMC staff and stakeholders.
- 2. Be an exceptional builder of relationships and trust.** The CFO will be or become a visible, positive presence across the full diversity of the region. The CFO will be dynamic and positive, comfortable with diversity, and a builder of productive, trusting relationships. The CFO will be a clear, compelling communicator and presenter, with the courage to express differing perspectives in ways that are respectful, diplomatic and welcoming of dialogue. The CFO will model and champion transparency, fairness, accountability, and collaboration.

3. Navigate and manage complexity. The CFO will be or become a subject-matter expert on North Georgia Conference history, business, financials, processes, policies and decisions. Polity developed during the Annual Conference Session is memorialized in the *Journal*, for which the Treasurer/CFO is a key interpreter. In addition to complex financials, the CFO oversees pensions, benefits, insurance, investments, real estate, technology and human resources for the Conference.

4. Lead and manage change at a time of uncertainty. The CFO will be an adaptive, creative leader of change at a time of uncertainty. The CFO will adopt and lead forward-looking best practices across the North Georgia Conference. (S)he will model and promote continuous improvement, modernization, and proactive response to challenges and disruptions facing the conference and the denomination, while at the same time leveraging the vast opportunities for ministry in the communities served by the laity and clergy of the North Georgia Conference. The CFO will be a force for strategic planning and adaptation, able to lead and implement change.

5. Innovate to ensure a healthy, sustainable future. The CFO will be a leader of vision, fresh ideas and solutions. Opportunities to build on include leveraging investments, deepening connectivity and collaboration across North Georgia, and continuing the transformation to the right size, structure and operating systems for the future. The CFO will apply business acumen, a heart for mission, and an entrepreneurial approach. The CFO will play an instrumental role helping the Conference and its constituents prepare for a vibrant, sustainable future.



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The CFO will adopt and lead forward-looking best practices that enable the Conference to continually improve, modernize, and proactively respond to challenge and disruption.

Personal Assets and Abilities

The ideal Treasurer/CFO is a Methodist leader with vision, financial acumen and passion for mission.

The CFO will have served in relevant nonprofit, corporate or faith-based contexts, and will be inspired to acquire and share knowledge of UMC history, polity, processes and values.

Personal assets will include:

- An authentic heart for people and mission.
- A servant leadership approach--courage, confidence *and* humility.
- Competence and tenacity.
- Financial and business acumen, coupled with entrepreneurial spirit. Ability to express controversial and differing perspectives with respect and diplomacy.
- Compassion and listening skills; ability to offer, invite, hear, and assimilate feedback.
- Commitment to respecting and advancing diversity, equity and inclusion.
- Strong oral, presentation and written communication skills.
- Ability to build consensus, *and* to make the tough decisions.
- Change-management and culture-building expertise.
- High energy and enthusiasm.
- Versatility, resilience and adaptive leadership skills.
- A calm, accessible, welcoming presence.



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Personal assets of the CFO will include an authentic heart for people and mission.

- Orientation to transparency, openness, collaboration and mutually beneficial solutions.
- A sense of humor.

The Organization

The **North Georgia Conference of the United Methodist Church** (NGUMC) is a regional body of **The United Methodist Church** (UMC). It includes 8 smaller geographical divisions called “districts.” Every year, typically in June, laity and clergy of the North Georgia Conference gather for business and worship at an event called the North Georgia Annual Conference.

The North Georgia Conference is overseen by **Resident Bishop Sue Hauptert-Johnson**, who works with the Extended Cabinet, staff, the Council on Finance and Administration (CFA) and other leadership entities. The Treasurer/CFO reports to CFA, and works with the Resident Bishop as well as all offices, major entities and constituencies of the UMC.

Thanks to committed and talented lay leadership, clergy, and Conference staff the Conference is well-positioned for the future. NGUMC has an annual budget of approximately \$17 million, all of which, either directly or indirectly, supports churches and ministries across North Georgia, and net assets of \$75 million. Real estate sales have generated \$32.5M for the Barnes Fund as of the end of FY '21, from which 5% is annually invested in ministry. Financial transparency is promoted, and salient financial information is posted publicly and included in the pre-Annual Conference Handbook, *Journal*, website, and other places.

Responsibilities of the Treasurer/CFO include:

- Conference financial and administrative functions, including revenue recognition and accounting, financial reporting, disbursements,



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budget preparation, investment management, annual audit coordination

- Benefits administration
- Database administration and technical support. The CFO's office provides web-based resources to local church financial personnel
- Conference human resource administration
- Governmental regulatory compliance and risk management
- Property management and related matters.

The North Georgia Conference is related to an active camp and retreat ministry, including Glisson Camp and Retreat Center in Dahlonega and Grow Day Camps hosted at various United Methodist churches. Related agencies include Murphy Harpst Children's Centers, Wellroot Family Services, North Georgia Conference Housing and Homeless Council, Wesley Woods Senior Living, Aldersgate Homes/Collinswood and others.

The state of Georgia is home to two United Methodist theological schools (Candler School of Theology and Gammon Theological Seminary) and nine United Methodist-related colleges and universities (Andrew College, Clark Atlanta University, Emory University, LaGrange College, Oxford College, Paine College, Reinhardt University, Wesleyan College and Young Harris College).

Location and Key Relationships

The North Georgia Conference is based in Atlanta. Currently at 1700 Century Circle NE, the Conference is considering a move to more community-adjacent office space. Among locations under consideration is one in College Park.



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The Treasurer/CFO manages a staff that includes the Treasurer/Director of Administrative Services, Controller, Benefits Officer, Benefits Assistant (PT), Accounts Payable/Payroll professional, and a remittance clerk/receptionist. In addition, the Conference IT office reports to the Treasurer and includes the IT Director and a technology help desk.

Primary relationships for the Treasurer/CFO include the Resident Bishop, the Conference Council on Finance and Administration (CFA), the Conference Board of Pension and Health Benefits, the Conference Board of Trustees (CBOT), the Commission on Equitable Compensation, and the Conference Personnel Policy and Practices Subcommittee of CFA. Additional relationships include District Superintendents, key North Georgia Conference staff including ministry area Department Directors, Local Church personnel and UM-related agency boards.

For potential consideration or to suggest a prospective candidate, please email NGCCFO@BoardWalkConsulting.com or call **Kathy Bremer** or **Lysondra Somerville** at 404-262-7392.

For the current status of this and other searches, please visit www.BoardWalkConsulting.com.

