

United Methodist Church  
New England Conference

## **POSITION DESCRIPTION**

**Position:** Conference Treasurer/Director of Administration/Conference Benefits Officer

**Supervisor:** The Conference Treasurer works under the supervision and direction of the Council on Finance and Administration

**Purpose of Position:** The Conference Treasurer serves as the chief source of advice and information on fiscal management and assures professional application of all accounting principles in accordance with the current *Book of Discipline*.

**Board and Committee Appointments:** The Conference Treasurer serves in an ex-officio capacity on the following: Council on Finance and Administration (CFA), the Conference Board of Trustees, the Conference Personnel Committee, the Conference Board of Pension and Health Benefits, Staff Integration Group, Conference Visioning Table, the Extended Cabinet, the Conference Investment Committee and the Equitable Compensation Commission.

### **Duties and Responsibilities:**

#### Relating to the Council on Finance and Administration

- Receives and disburses, in accordance with the actions of the annual conference and the provisions of the *Book of Discipline*, remittances from local church treasurers for all duly authorized general, jurisdictional, annual conference, and district causes
- Executes the policies established by CFA relating to cash flow, investments, and other financial matters
- Calculates all Conference apportionments as approved by Annual Conference and distributes apportionments to local churches
- Coordinates the preparation and distribution of monthly apportionment statements and bills to local churches
- Coordinates the preparation and distribution of regular and periodic reports related to receipts and disbursements to appropriate persons, boards, and agencies
- Maintains annual budget of the Conference
- Coordinates the work of the Conference Statistician in preparation of the annual *Local Church Report* to the Annual Conference, assuring the accuracy of all statistical reports and providing requested information from district and conference boards and agencies

- Provides counsel and guidance to local church treasurers, financial secretaries, and committees on finance in the development of standardized financial recording and reporting systems
- Invests funds in accordance with policies and procedures established CFA
- Coordinates information technology systems for the conference, particularly those related to system-wide infrastructure and financial/accounting systems, and in conjunction with the Director of Communications the Web-based communication systems
- Attends in-service or training events that relate directly to stated responsibilities
- Performs other responsibilities as necessary or assigned by CFA

#### Relating to the Board of Pension and Health Benefits

- Serves as the Conference Pension and Benefits Officer for the General Board of Pensions and Health Benefits (GBOPHB) on all matters relating to pension benefits and services under the Ministerial Pension Plan (MPP), Comprehensive Protection Plan (CPP), Basic Protection Plan (BPP), Cumulative Pension and Benefits Fund (CPBF), and Clergy Retirement Security Plan (CRSP)
- Oversees work of Conference Benefits Coordinator to insure proper enrollment of clergy in above eligible plans
- Oversees work of Conference Benefits Coordinator to insure proper enrollment lay employees of the Conference in above eligible plans
- Prepares annual budget requests in cooperation with the Chair of the Conference Board of Pension and Health Benefits
- Oversees work of Conference Benefits Coordinator to record and report all clergy status changes, as well as compensation and appointment changes, to GBOPHB through the Participants' Record Keeping (PARK) computer system (direct connection to GBOPHB)
- Works with the Insurance Committee of the Conference Board to determine trends of the health insurance claims experience
- Oversees work of Conference Benefits Coordinator with the General Board of Pensions and Health Benefits's HealthFlex program
  1. Oversees the enrollment of newly eligible participants
  2. Oversees the billing of premiums
  3. Provides reports to the Conference Board concerning claims and trends for the program
  4. Terminates health insurance coverage in accordance with established policy
- Attends General Board of Pension and Health Benefits Forums and training events as scheduled
- Performs other duties as assigned by CBOPHB in consultation with CFA

### Relating to the Board of Trustees

Serves as staff resource person in following capacities:

1. Attends meetings as scheduled
2. Oversees maintenance of Conference Center and works with Trustees on maintenance issues of conference parsonages
3. Coordinates with Conference Chancellor, and obtains signatures of Board officers for deeds and other legal documents as required by action of the Annual Conference
4. Serves as Treasurer for the incorporated Annual Conference
5. Oversee the accounting for expenses and income for the work of the Trustees
6. Coordinates provision of financial reports to the Trustees' treasurer
7. Provides primary staff support for the Trustees' Investment Committee and Conference Insurance Committee

### Relating to the Commission On Equitable Compensation

1. Attends meetings as scheduled or called by the chairpersons
2. Provides financial reports as requested by the chairpersons
3. Provides pension and health insurance information as appropriate to the Board of Ministry
4. Assists in developing annual budgets as requested
5. Coordinates legal issues with the Conference Chancellor
6. Provides church statistical and financial information as appropriate to the Commission on Equitable Compensation

### Relating to the Conference Journal

1. Works with the Conference Secretary to insure accurate, timely production of the Annual Conference Journal
2. Coordinate administrative support for work of Conference Secretary

### Relating to Statistician

1. Oversees work of Conference Statistician in the preparation of the annual Local Church Report to the Annual Conference and related requests for information from the General Council on Finance and Administration
2. Attends General Council on Finance and Administration training events as scheduled

### Other Responsibilities

Other duties as assigned by CFA.

**Supervisory Responsibilities:** The Conference Treasurer provides general leadership for the Office of Administrative Ministries and supervises the following positions:

Financial Services Coordinator  
Conference Benefits Coordinator  
Remittance Specialist  
Administrative Assistant

**Physical Demands:**

The position requires a **low** degree of: standing, walking, climbing, stooping, kneeling, crouching, crawling, and lifting

The position requires a **high** degree of: sitting, talking, hearing, and use of hands to finger, handle, and feel

The position also requires the following physical abilities: close vision, distance vision

There is a low level of noise associated with the position.

**Qualifications and Competencies:**

- Four-year degree in accounting or business administration
- Three to five years non-profit senior level management experience
- Knowledge of the workings of and support for the ministry of the United Methodist Church
- Comprehensive knowledge of non-profit governance, management, accounting, financial planning and business processes
- Knowledge of administration and personnel management and all aspects of financial functions
- Excellent communication skills