

**FIRST UNITED METHODIST CHURCH**  
**125 W. Main Street, Salem, VA 24153**

**POSITION DESCRIPTION**  
**CHURCH OFFICE & FINANCIAL MANAGER**

The Church Office and Financial Manager is expected to be a person of high moral character who has an appreciation and love for the task of the Church as an extension of Christ's Ministry in the world. The Church Office & Financial Manager shall see her/his role as one of showing genuine care and concern for the spiritual needs of those in the congregation and maintain strict confidentiality concerning church finances and member contributions.

**I. ORGANIZATIONAL RELATIONSHIP**

The Church Office & Financial Manager shall serve under the direct supervision of the Lead Pastor, and at the will and pleasure of the Staff-Parish Relations Committee. This position also works in conjunction with the Finance Chair and Church Treasurer.

**II. PRINCIPAL FUNCTIONS AND RESPONSIBILITIES - OFFICE**

- A. Staff the front office during regular business hours, greet and assist visitors, and interact with both visitors and staff in a professional manner. Regular business hours is defined as Monday through Thursday from 8:30 a.m. until 4:00 p.m. and Fridays from 8:30 a.m. to 12:00 noon, although Friday hours may be worked remotely.
- B. Coordinates the maintenance of the Master Church Calendar and the calendar for the Lead Pastor, Maintaining confidential conversations, counseling visits, and records.
- C. Coordinates the Maintenance of permanent church records of membership, baptisms, weddings, deaths, and other data as required by the Virginia Conference of the United Methodist Church.
- D. Manages the maintenance of all office equipment (printers, copiers, computers, etc.) in coordination with the current IT support firm.
- E. Develops and monitors all office related budgeted line items and coordinates the purchasing of all office supplies.
- F. Prepares membership Charge Conference reporting.
- G. Develops, organizes, and executes ongoing project work in coordination with the Lead Pastor.
- H. Develops communication strategies with the Lead Pastor and coordinates communications planning and goals.
- I. Creates, edits, and proofreads a variety of communications.
- J. Assists with design and updates of church website including the production of promotional videos and pictures.
- K. Recruits, trains, and schedules office volunteers when needed.
- L. Performs necessary church errands with personal vehicle such as delivering mailings, bank visits, on-site purchases, etc.
- M. Attends and positively participates in staff and communication meetings.
- N. Performs other related office duties as requested or directed by the Lead Pastor and SPRC

**III. PRINCIPAL FUNCTIONS AND RESPONSIBILITIES – FINANCIAL**

- A. Maintains financial records of the church membership and outside contributions. Keys cash/check contributions and imports online credit/debit card ACH transactions.
- B. Attends monthly Church Financial Committee meetings and is responsible for recording the minutes of the meetings
- C. Coordinates with Lead Pastor on the annual church stewardship campaign; prepares multiple mailings and communications

- D. Obtains and records pledges made during the annual stewardship campaign; provides weekly updates to the Lead Pastor, Finance Chair, and Treasurer via the Pledge/Budget Statistics spreadsheet utilizing data from Realm and ACS financials
- E. Develops the Annual Church Operating Budget with assistance from various ministry areas, the Lead Pastor, Finance Chair, and Treasurer
- F. Prepares end of year Asset and Liability, Expenses, and income tables for the Virginia Conference of the United Methodist Church
- G. Prepares documents for Auditors as needed
- H. Performs other duties as directed by the Lead Pastor, Finance Chair, and Treasurer
- I. Prepares all documents for monthly Church Financial Meetings as requested by the Finance Chair/Treasurer including but not limited to: Balance Sheet, Detailed Analysis of Revenue and Expenses, Restricted Accounts Detailed Analysis of Revenue and Expenses, Restricted Accounts Detail, and Bank Reconciliation (Preparation will be accomplished with the assistance of the Finance Chair and/or Treasurer)
- J. Prepares year-end financial reports including but not limited to: W-2 Wage and Tax Statements, 1099 and other income Forms, Annual 941 Employer's Federal Tax Return and Virginia State Tax Report (Preparation will be accomplished with the assistance of the Finance Chair and/or Treasurer)

The remaining duties are associated with the Wesleyan Preschool with the understanding, as above, that preparation will be accomplished with the assistance of the Finance Chair and/or Treasurer as needed.

- K. Prepares and submits Wesleyan Preschool quarterly 941 Employers Federal Tax Return
- L. Prepares the monthly financial statement for the Wesleyan Preschool Director
- M. Reconciles monthly Church and Wesleyan Preschool bank accounts
- N. Prepares the monthly financial statement for the Wesleyan Preschool Director

#### IV. Qualifications

- A. Bachelor's Degree in Business/Accounting or significant experience in both required
- B. Must possess personal characteristics necessary for working with church staff, members, and visitors
- C. Ability to recruit and train volunteers
- D. Must have excellent written and verbal communication skills, time management, and organizational skills
- E. Intermediate to advanced knowledge of Microsoft Office platforms required (including Outlook, Word, Excel, Publisher, and Power Point)
- F. Experience using various software and web-based platforms such as "ACS Financials, Realm Planning Center, Adobe, Google Calendar, Wix Website Development, etc.
- G. Must have business experience and be proficient in general bookkeeping procedures, computer-based financial processing, computer-based word processing and payroll procedures
- H. Must have sufficient Job experience to demonstrate and perform the above listed job responsibilities
- I. Knowledge of the United Methodist Church, and the organizational structure of First United Methodist Church

#### V. Position Description Review

This position description is to be reviewed at least annually and revised according to the needs and opportunities which exist at that time

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**Chairman, Staff-Parish Relations Committee**

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**Lead Pastor**

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**Church Office & Financial Manager**

**Date**

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**(Date of this Document: 25 February 2022)**