JOB TITLE: Controller

DEPARTMENT: Business Office

REPORTS TO: Director of Finance and Business Operations

FLSA STATUS: Exempt

TYPE: Staff

CATEGORY: Full Time; 40 Hours

JOB SUMMARY
The role of the Controller is an integral part of the Business Office, responsible for coordinating and assisting in the preparation of financial reports such as statements of activities, statements of financial position, statements of cash flows, and analyses of historical and projected income and expenses, in addition to other special reports that may be needed. The Controller oversees the accounting, purchasing, student billing and collections, and endowment functions. In addition, the controller oversees the functions of the audit, budgeting, and special projects as assigned.

Reporting directly to the Director of Finance and Business Operations, the Controller is also responsible for recommending and administering all accounting policies and procedures, ensuring that strong internal controls and effective transaction processing routines protect the assets of the school and result in meaningful, timely, and accurate financial reporting.

ESSENTIAL FUNCTIONS

Accounting

- Perform timely month-end closes, including all necessary financial reconciliations.

- Reconcile the school’s investment activity on a monthly basis, including fund unitization.

- Ensure accurate and appropriate general ledger coding and/or approval of all
revenue, expenditure, and journal transactions, including unrestricted, temporarily restricted, and permanently restricted designations.

- Responsible for tracking and maintaining a restricted net asset activity.
- Remain current on new accounting regulations and relevant non-profit accounting issues.
- Maintain the chart of accounts, including the creation of new funds, projects, accounts, and departments.

Budget, Reporting & Forecasting

- Assist in preparing the annual operating budget, including process development.
- Prepare the monthly financial package including a statement of activities, variance, and cash flow analyses, and capital project summaries.
- Assist the Director of Finance and Business Operations in preparation and monitoring of monthly departmental budget reports and forecasts, working with administrators and Budget Directors regarding budget performance.
- Provide support for the Director of Finance and Business Operations at Finance Committee or other Board-related meetings.

Billing & Collections

- Manage the FACTS Tuition Management system for student billing, payments, and collections.
- Develop and maintain rapport with families and be able to respond appropriately to inquiries.

Advancement

- Reconcile contributions on a monthly basis between the Business Office and Advancement.
- Coordinate with the Advancement Office to prepare annual reports for all endowed
funds.

**ESSENTIAL FUNCTIONS** (Continued)

Audit & Tax

- Responsible for the annual audit, including work paper preparation and financial statement review.
- Preparation and file the annual 1099 forms and Massachusetts Form 3ABC.
- Resolve any reporting issues with the IRS and other Federal and State regulatory agencies.

Policies & Internal Controls

- Update existing accounting and operating policies as necessary.
- Communicate policy changes with appropriate stakeholders and monitor compliance with such policies.

Other Duties and Responsibilities

- Preparation of periodic surveys and compliance reports for various organizations (e.g. NAIS, NBOA).
- Responsible for preparing internal and external requests for financial data.
- Provide analysis and support for auxiliary programs.
- Provide training and support to employees with regard to business processes, operations, and technology.
- Cross-train on all aspects of the Business Office operations, including payroll and accounts payable.
- Provide direction and supervision to other employees, as necessary.
- Other duties as assigned.
REQUIREMENTS:

Minimum Qualifications:

▪ Bachelor’s degree in accounting, finance, or related field required from an accredited institution.

▪ A minimum of 5-7 years of related experience in a non-profit setting.

Preferred Qualifications:

▪ Experience in an independent school or higher education setting is a plus.

▪ MBA or CPA preferred

▪ Supervisory experience is a plus.

Other Qualifications:
All prospective employees must be able to adequately clear a background check.

KNOWLEDGE, SKILLS, AND ABILITIES
This position requires strong organization, written and verbal communication, problem-solving, and interpersonal skills. Strong proficiency with Excel and other computerized accounting systems is required (experience with financial applications such as Sage Intacct, FACTS Tuition Management, and Raiser’s Edge highly beneficial). The highest regard for confidentiality and exemplary ethical standards are necessary, as well as the ability to manage multiple tasks and projects under the pressure of deadlines.

To perform the job successfully, an individual should demonstrate the following:

▪ Effective Written and Verbal Communications Skills: Exhibits strong interpersonal skills and maintains open communication channels with numerous constituencies of the School, including peers, administrators, parents, and vendors; able to effectively communicate key data and complex accounting issues, including presentations and dashboards, to various members of the Ursuline community.

▪ Ability to Learn and Teach Others: Recognizes the importance of learning and motivates others by own enthusiasm. Able to learn and reproduce the current processes and recommend best practices to streamline Business Office and School procedures.

▪ Time Management Skills: Manages many tasks and projects simultaneously while
adhering to deadlines. Maintains appropriate work/life balance without compromising expectations of others. Respected for the ability to meet deadlines and “make” time for unexpected projects or requests. Seeks performance feedback from their supervisor and from others with whom they interact.

**KNOWLEDGE, SKILLS, AND ABILITIES (Continued)**

- **Organizational Skills**: Creates action plans to meet goals and objectives, and conducts periodic reviews of progress and measures against goals. Recommends and establishes internal and external policies to ensure the success of the Business Office and School; establishes broad policies to ensure success. Exercises self-motivation with an excitement to learn and grow within the position and organization.

- **Problem Solving Skills**: Considers a broad range of internal and external factors when solving problems. Grasps complexities and perceives relationships among different problems or issues.

- **Community**: Actively participate in the life of the Ursuline Community by participating and volunteering in campus events, being visible and accessible to all members of the community.

**WORKING CONDITIONS**
The physical demands and work environment described here are representative of those that must be met by an employee to successfully perform the essential functions of this job. Reasonable accommodations may be made to enable individuals with disabilities to perform the essential functions.

While performing the duties of this job, the employee must be physically and mentally capable of performing multiple tasks (such as phone calls, computer work, and receiving visitors) under stressful situations and able to function in a fast-paced environment.

The noise level in the work environment is usually moderately quiet; however, variations in noise level may occur when the employee attends school functions such as assemblies, sports activities, etc.

**ADDITIONAL INFORMATION**
Ursuline Academy is an equal opportunity employer and committed to a diverse workforce. All applicants will receive consideration for employment without regard to race, color, religion, gender, sexual orientation, sexual identity or expression, national origin, age, disability, veteran status, or any other basis protected by applicable state and federal law.
APPLICATION INSTRUCTIONS
If interested, please email a cover letter including examples of prior success in a similar environment, a resume, and a list of references to lluetzen@ursulineacademy.net