



<b>Position Title:</b>	<b>Controller</b>
<b>Date Modified:</b>	April 2023
<b>FLSA Classification:</b>	Exempt
<b>Reports to:</b>	CFO
<b>Position Purpose:</b>	Oversee the accounting functions and activities of the organization including the reporting of financial information to internal and external parties, assisting with budget preparation, and ensuring reporting compliance.

### **Essential Functions**

- Responsible for management of the School's financial resources via accurate and timely financial information
- Work to maintain a positive work environment and foster an environment of respect and teamwork
- Hire, train and retain skilled accounting staff
- Evaluate, implement and maintain optimal internal controls
- Assist the CFO in the preparation and monitoring of departmental budgets and forecasts working with other administrators and department heads concerning budget performance.
- Prepare and/or review all periodic surveys and reports required by school trade organizations (ie., DASL, BIIS, etc.)
- Oversee annual audits including responding to auditor requests and questions, preparation of financial statements, footnotes, and schedules and review of final audit reports
- Provide data and prepare reports required by regulatory agencies including tax returns and other school specific filings, such as the 990 and Agreed Upon Procedures (AUP).
- Recommend, develop and draft policies and procedures related to the accounting department. Communicate accounting policies to employees and ensure compliance with such policies.
- Assess current accounting operations, offering recommendations for improvement and implementing new processes.
- Provides superior customer service relative to financial issues for all constituencies of the Business Office, including parents, employees, department managers, and vendors, etc.
- Oversee special projects
- Perform other duties as assigned by the CFO

### **Qualifications**

- Minimum of Bachelor's degree in accounting, finance or relevant subject, Certified Public Accountant (CPA) preferred
- Minimum of 5 years accounting and management experience
- Able to communicate effectively with school representatives, parents, students, and representatives from the business community
- Possess working knowledge of business accounting policies, procedures, practices

and software programs. Experience with Blackbaud Accounting Systems, FACTS Tuition Management, PowerPlan and UKG Ready preferred.

- Proficiency in Microsoft Office Suite, including Outlook, Excel, Word, Power Point, and Teams required
- Effectively manage multiple functions, activities, and deadlines in an environment with ever-changing priorities
- Ability to communicate effectively and thoughtfully with others throughout the School and business communities.
- Support Shorecrest's mission and core values

**Physical Requirements and Work Environment**

- Regularly sit, talk and hear
- Regularly use near and distance vision
- Work at desk and computer screen for extended periods of time
- Turn, bend and reach
- Able to occasionally lift up to 20 lbs
- Work in a traditional climate controlled office environment

**Acknowledgment**

I understand the responsibilities and competencies of the Controller position.

---

Signature

Date

**POLICY OF NON-DISCRIMINATION**

Shorecrest Preparatory School welcomes candidates for admission or employment, regardless of age, race, culture, gender, sexual orientation, religion, socio-economic status, national or ethnic origin, and does not discriminate on the basis of any category protected by law in the administration of any of its programs.

Shorecrest participates in E-Verify