



Controller
JOB DESCRIPTION

REPORTS TO: Vice President
PAYROLL STATUS: Salary
OVERTIME CLASS: Exempt
LOCATION: Michigan City, IN (hybrid consideration possible)

I. JOB SUMMARY:

The Controller reports to the Vice President and will administer Unity’s accounting and finance functions from A-Z. Following community foundation accounting best practices, the Controller will implement and continually improve the infrastructure/systems needed to support a dynamic and growing organization. Such systems include financial, accounting, legal, information technology (IT), and physical infrastructure. The Controller will be involved in board operations, strategic planning and implementation, budgeting, fund advisor/donor relations and will work closely with other staff. Due to the continuous interaction with donors this employee must be detail-oriented, have a pleasant disposition and impeccable customer service skills. Additional responsibilities will be assigned to successfully implement the Strategic Plan and Annual Business Plans.

II. QUALIFICATIONS DESIRED FOR THIS POSITION:

A. PROFESSIONAL/TECHNICAL ABILITIES:

- Combined education and experience are equivalent to a master’s degree in finance or business administration. (Preferred)
- Five years or more in a progressive management responsibility role, specifically in the finance arena within a nonprofit agency. (Required); Community Foundation accounting (Preferred)
- Capable of managing all aspects of finance and administration and maintaining effective relationships with financial institutions. (Required)
- Any combination of accounting, banking, budgeting, financial advising/management, fund management, customer service, donor service, investment management services. (Required)
- Superior analytical skills; Strong attention to detail and accuracy. (Required)
- Knowledge and skills in computer system/software applications (including, Microsoft Office/Office 365); (Required); Knowledge of Foundation CRM/database management; Project management program knowledge (Desired.)
- Clear and effective oral and written communications (Required)
- Clear and effective organizational and time management skills (Required)

B. PERSONAL CHARACTERISTICS:

- Exhibits a commitment to serve the community
- Maintains professional image
- Demonstrates courtesy, friendliness, and consideration
- Thinks independently and creatively, is willing to learn and grow
- Remains flexible and successful within changing environment and demands
- Exercises good judgment, discernment, and decision-making capabilities
- Shows evidence of dependability and effective work habits
- Maintains strict confidentiality of Unity and donor information

III. WORKING CONDITIONS:

- A. PHYSICAL DEMANDS:** Must have the schedule freedom to work varying hours, including evenings when necessary. Sitting, standing, walking, and lifting are included. Acute verbal, hearing, and visual senses required for communication. Work environment includes various locations in office and public. Manual dexterity and visual capability to use computer, audio/visual, and general office equipment are necessary. The position may include lifting and carrying up to 20 lbs.
- B. MENTAL DEMANDS:** Must be able to work under moderate to high stress during peak activity times.

IV. DUTIES AND RESPONSIBILITIES:

A. ADMINISTRATIVE-ACCOUNTING

- Serve as the main Foundation contact for all financial inquiries from fund advisors, donors, grantees, outside audit firms, vendors, investment managers, trust officers and board members.
- Capable of managing all aspects of finance and administration and maintaining effective relationships with financial institutions.
- Oversees and enters all disbursements in accordance with authority granted by the Board and coordinates the accounting for grants and scholarships with appropriate staff.
- Oversees and enters all gift receipts and coordinates gift accounting and acknowledgements and new fund set-ups with appropriate personnel.
- Manages and enters accounts payable and receivable and grants from other funders.
- Owns and monitors the annual budget with the President and VP.
- Provides appropriate financial reports, proformas, documents, and data to the Board and staff as requested with regular reports at each Board meeting.
- Prepares fund statements for all funds semi-annually, or as requested and provides additional communication to fund advisors as needed
- Negotiates and manages all external agreements (e.g. special events, merchant services, office equipment, leases, etc.)
- Train new Board members and staff on finance portion of responsibilities
- Works with Operations Manager and VP to maintain appropriate insurance levels for the Foundation's protection
- Works with the Vice President to maintain and review all Board-approved policies and assure compliance with the CoF National Standards Process every three years.

B. DATABASE & INFORMATION MANAGEMENT

- Serves as Team Leader on the administration and training for the Foundant Donor Portal
- Supervises the maintenance of all records in Foundant assuring highest level of accuracy and consistency
- Keeps current on new releases/features from the Foundant and notifies or trains affected staff
- Works with President to assure document and data destruction and retention policies are adhered to and documented.

C. STAR CENTER & Physical premises

- Works with outside vendors for all technology needs including but not limited to computers, phone system, cloud-based technology, audio/visual equipment, and wireless connectivity
- Keep current and track all fixed assets including art on loan from artists
- Assures facilities have equipment and supplies as needed.
- Works with Property Manager to address disaster preparedness and needs of tenants, guests, and vendors as they arise and updates Vice President on any concerns

D. OTHER

- Maintains procedures manual for the Controller position
- Participates and brings passion and energy to staff team, committee, and board meetings

HOURS AND COMPENSATION

- Full-time, Salary, Exempt, Benefits-eligible
- Compensation commensurate with individual experience and qualifications
- Downtown Michigan City nonprofit co-working space

To apply contact Shannon Walker, Vice President, at swalker@uflc.net.