

## California Institute of Integral Studies (CIIS)

### Controller

***CIIS is seeking a hands-on, systems- and process-savvy individual to effectively lead Accounting and Controls for this growing, financially-healthy nonprofit university in San Francisco.***

Founded in 1968, [California Institute of Integral Studies](#) (CIIS) is an internationally recognized leader in integral education. CIIS strives to embody spirit, intellect, and wisdom in service of individuals, communities, and the earth. CIIS has an enrollment of over 1,800 students pursuing degrees in a variety of academic programs in its schools of Consciousness and Transformation, Professional Psychology and Health, and Undergraduate Studies. CIIS offers an online master's program in Applied Psychology taught in Mandarin in collaboration with Zijing in China. CIIS is accredited by the Western Senior College and University Commission (WSCUC).

CIIS is a mosaic of faces and philosophies, backgrounds and beliefs. Faculty, staff and students are intellectually engaged and socially active. Programs inspire creativity, nurture community, cultivate curiosity, and foster social good. CIIS hosts a vibrant art exhibition program and events through its Public Programs & Performances division, including workshops, concerts and conferences. The University also provides low-cost mental health and acupuncture services to residents of the San Francisco Bay Area through its six award-winning counseling clinics.

California Institute for Integral Studies is growing by design, and infrastructure, systems and human capital need to keep pace. One of the key goals in the [2022-2026 Strategic Plan](#) is for CIIS to develop bold and innovative approaches to financial and institutional sustainability. As it relates to the Controller role, the priorities are 1) to provide proactive support to the University through automation and optimization of systems, practices, reporting and delivery to monitor financial health and 2) to develop a regular and timely transparent budget process that drives revenue and reduces costs to support financial sustainability.

California Institute for Integral Studies has an annual budget of \$46M with approximately 76% revenue received from tuition, 21% contributed, and 2% from other sources. Fund development activities are increasing – particularly approaching the 60<sup>th</sup> anniversary of CIIS. There is a healthy reserve and no debt. CIIS employs more than 500 people, many of whom are seasonal staff. Its regular employee community is approximately 160 staff and 85 faculty. The Controller reports to the Assistant Vice President of Finance and Administration, has two or more direct reports, and manages a department staff of 8 or more.

### **POSITION SUMMARY**

The Controller formulates goals and objectives for the department in accordance with the overall mission and goals of the University. The Controller serves as the Director of the Accounting and Control Department and is the senior-most accountant who ensures compliance with all applicable college, state and federal regulations and policies. The Controller is a strong individual contributor and leads day-to-day accounting operations, develops policies, and works to improve procedures and internal controls.

The Controller is responsible for organizing, directing, and evaluating a wide variety of financial activities, including the planning and development of the University's accounting and financial control and for the overall control of the general ledger, financial reporting, and treasury management. The position oversees restricted and unrestricted accounting, financial systems

management, payroll, accounts payable, accounts receivable, plant accounting and working capital investments. The Controller is responsible for leading the budgeting process in collaboration with department heads in developing and monitoring university-wide and departmental budgets.

The position works, collaborates and maintains collegial relationships with all functional areas and academic programs including students, staff, Board of Trustees, executive leadership, department chairs, directors, and budget managers, and maintains effective relationships with external auditors, accountants, advisors, bankers, intermediaries, and vendors.

### **ADDITIONAL RESPONSIBILITIES**

Ensures consistency with CIIS's mission and Strategic Plan and compliance with Board of Trustees' policies, State and Federal fiscal management laws and regulations, and generally accepted accounting standards.

- Provide leadership and direction to the accounting, payroll, and student accounts staff, including establishing goals and objectives, Key Performance Indicators (KPI) and Key Performance Drivers (KPD).
- Work closely with the CFO on the identification and resolution of strategic financial issues with current or potential impact on CIIS as an enterprise, including advising on the financial condition of institutional funds and accounts and on appropriate fiscal procedures.
- With the Vice Provost of Academic Administration, work with Program Chairs and Deans to develop annual budgets; provide training and support so they can effectively manage and plan budgets.
- Work closely with the Director of Business Strategy and Financial Planning in the process of budget development and revision; participate in all budget discussions at the Institute Planning & Budget Committee and Board of Trustees meetings; monitor the budget and prepare monthly status and variance reports, including enrollment and all tuition and non-tuition revenue projections.
- Administer the general ledger and accounting system for all funds which fulfills internal and external information and reporting requirements and comply with GAAP, GASB, WSCUC, and NACUBO guidelines.
- Lead the monthly, quarterly, and year-end accounting reconciliations and closes, including reconciliation of balance sheets, bank accounts, and other financial reporting, assuring the accuracy and compliance of all activities and reports.
- Oversee internal and external audits and preparation of all audit reports, ensuring timely and accurate completion within expected timelines; prepare and submit IRS Form 990 in a timely manner.
- Analyze the income and expenses of CIIS and auxiliary operations, clinics, and public programs, including directing departments, clinics, auxiliaries and public programs on good cash handling and internal control practices.
- Review and analyze major contractual obligations, contracts, grants and awards of the University to ensure consistency with overall financial goals, objectives and plans, and

compliance with CIIS financial policies, procedures, and standards, including the oversight of all compliance reporting requirements with banks, lenders, and third parties.

- Responsible for the accuracy of data; prepare reports, statements, studies, and analyses as required or requested and in a timely manner.
- Provide inspiring leadership and management to the Accounting team; maintain an organizational structure and staffing to effectively accomplish the department's overall goals and objectives; direct and oversee the hiring, development, management, and evaluation of department staff.
- Maintain and manage a Department calendar of required reporting activity.
- Maintain an up-to-date knowledge of University operating systems, third party or bank reporting systems, and trends in higher education.

### **QUALIFICATIONS AND CHARACTERISTICS**

The Controller is someone who thrives in a fast-paced, dynamic, growing institution. They should relate well within a multicultural environment that values the diversity of its student body and workforce and actively promotes equity and inclusion. While no single candidate will possess all qualifications, a strong candidate will have a range of the following experience, characteristics, and qualifications:

- Five+ years accounting/finance experience in higher education or non-profit preferred.
- Bachelor's degree in business, accounting, or finance; master's degree is highly desirable.
- Experience in or knowledge of non-profit accounting, including contract and grant accounting and revenue recognition issues; knowledge, experience, and application of GAAP; background in managing general accounting; budgeting and planning; procedures and controls; and analysis and reporting.
- Experience with the mechanics of international contracts, money regulations and movement, accounting, and currencies.
- Tech savvy; knowledge of various Higher-Ed related FinTech programs such as Ellucian Colleague or Banner, Argos, Paychex, Syntellis, and Emburse-Chrome River is desired. Excellent understanding of enterprise database systems and other financial systems.
- Outstanding people management skills with the ability to empower and support staff; a commitment to professional development; effective delegation skills.
- A systems-thinker to define, improve and implement effective, efficient processes, systems and operational workflows; establish and uphold best practices; a commitment to transparency and accountability; ability to proactively solve issues with the judgment to know when to elevate them to leadership.
- Comfort and confidence to engage with a broad spectrum of internal (staff, faculty, students) and external constituents (including banks, intermediaries, auditors, vendors) in a collegial, cooperative, and respectful manner.

- Ability to analyse and formulate disparate information into sound, well-organized plans; can convey complex information and concepts clearly and in non-confrontational, non-polarizing ways to a range of diverse audiences.
- Intrepid yet tactful; determined yet respectful of others' concerns; someone with the flexibility and creativity needed to find alternative ways to reach objectives when barriers arise; a skilled negotiator who does not drive themselves or others into a corner.
- Strong interpersonal skills, including humility, unimpeachable integrity, strong moral compass, and an openness to give and receive feedback; emotionally mature with flexibility and sensitivity to work with diverse personalities and situations.

The compensation range for the Controller position is \$135,000 to \$160,000, plus comprehensive benefits. The position works on-campus in San Francisco four days a week.

### **EQUAL EMPLOYMENT OPPORTUNITY POLICY**

CIIS strives to cultivate and preserve a culture of inclusion and belonging as part of its [Seven Commitments](#). More than accept difference, we honor and celebrate our staff's diversity of experiences, perspectives, and identities. Together, our community creates and maintains working and learning environments that are inclusive, equitable, accessible, and welcoming.

CIIS is proud to be an equal opportunity employer. We are committed to providing an open, fair, inclusive, non-discriminatory environment for all individuals across differences of race, religion, sexual orientation, gender identity, national origin, socio-economic status, ethnicity, age, physical ability, or medical condition. We seek to increase the presence, representation, and inclusion of U.S. historically under-represented people of color, international, bilingual, and bicultural students, faculty, and staff; and, to provide an environment that will attract and retain individuals identified as lesbian, gay, bisexual, transgender, queer, questioning and intersex (LGBTQQI+). CIIS is committed to compliance with all fair employment practices regarding citizenship and immigration status.

For more information please contact:

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