

## St. John's Episcopal School Controller

*St. John's Episcopal School seeks a Controller who will report to the Chief Financial Officer and routinely interact with the Head of School, Board and Church leaders.*

*The Controller is a hands-on subject matter expert; supervises and collaborates with accounting, bookkeeping, audit and other professionals involved in managing the school's expenses, revenue and finances; assures accuracy and accessibility of financial data; and prepares timely, accurate financial reports and other materials.*

### **BACKGROUND**

Established in 1988 and grounded in the rich history of diversity and excellence in Episcopal education, [St. John's Episcopal School](#) fosters every child's full intellectual, physical and spiritual development in a nurturing learning environment through programs built on a balance of tradition and innovation. The school provides a world-class STEAM (science, technology, engineering, arts and math) education within a faith-based culture that combines academic rigor with individualized instruction and meaningful character development. St. John's is a member of the National Association of Episcopal Schools and the National Association of Independent Schools, and it is a fully accredited member of the California Association of Independent Schools and the National Association of the Education of Young Children.

The school is located 40 miles southeast of Los Angeles in Rancho Santa Margarita (Orange County). St. John's annually serves 510 students and their families, has a balanced budget of about \$10M, and employs 100 faculty and staff. Finances are responsibly managed, meaning that planning and budgeting processes are straightforward, and there are strong controls in place to monitor actual expenses against the plan. Multi-year investments in facilities, new programs and educational technology are undertaken with a strong focus on financial sustainability.

St John's has used a range of different systems over the last years, with various financial processes run by Blackbaud Financial Edge for most accounting and reporting, Facts Online Tuition Payment Management, and Paycom for payroll. Many of the school's core systems are currently being migrated to the Veracross software suite, and there is a possibility that some finance functions may also be migrated to Veracross. It is important that candidates have worked with different cloud-based financial systems and know how such systems interact with other business systems used within customer-serving environments. Some experience with the challenges of migrating systems and reconciling data shared by different platforms is advantageous. Candidates are not expected to have experience within a school environment or with systems like Veracross, Blackbaud and Facts, but some exposure to such environments has advantages.

### **BASIC FUNCTION**

Reporting to the CFO, the Controller must have a strong understanding of GAAP accrual and cash accounting processes, systems and controls, and is responsible for: helping to shape the annual budget and regularly reporting on budget vs. actual numbers throughout the year; managing accounts receivables, accounts payables, and purchase order processing; helping to shape the chart of accounts, manage the general ledger and produce regular and customized ad hoc financial reports tied to the work and organizational structure of the school; oversees fixed and depreciating asset accounting; and oversees student store accounting.

Other key responsibilities include, but are not limited to:

- Customer-service oriented coaching and regular training for all staff and, in particular, department heads, on financial workflows, standards and materials; supporting others with their financial information processing and reporting, from initial planning through to producing accurate end-of-



- year financial data;
- Supporting fundraising and admissions personnel as they develop revenue forecasts and cultivate the diverse income streams required to operate St John's Episcopal School;
- Contributing to the evolution and improvement of handbooks, process documentation, standards, and such;
- Contributing to annual accreditation processes, and production of financial data for both accrediting and regulatory oversight agencies; collecting and submitting all documentation for the annual audit and functioning as a liaison to the auditors;
- Assuring adherence to the cadence of daily, monthly, quarterly and annual transactions, reports, reconciliations, etc., in the process shaping workflows and standards that assure accuracy as data moves among systems used by St John's Episcopal School;
- With the CFO, managing the organization's petty cash and relationships with banks, auditors and others involved in finance workflows; monitoring contractual relationships and compliance with contract terms; and preparing balance sheet, P&L statements, tax, audit and other required financial documents;
- Assuring accuracy of financial data shared with CAIS/DASL (California Assoc. of Independent Schools), NBOA/BIIS (Business Leadership for Independent Schools), etc.;
- Close, empathetic and business-like collaboration with parents, faculty, staff and others that are part of the St. John's Episcopal School Family.

### **IDEAL EXPERIENCE AND CHARACTERISTICS**

Candidates should have the following minimum experience and qualifications:

- Five+ years' experience of experience in a similar role, with the ability to shape financial systems, workflows and reports that are accurate and fulfill the business requirements of a similarly scaled organization.
- A mix of finance experience in customer-serving nonprofit and business environments is favored. Experience in nonprofit accounting practices is important, but even more important is a demonstrated track record in quickly adapting to new financial environments and systems.
- Educational credentials should include a mix of study in the full range of financial accounting, bookkeeping and cash flow management workflows, which might be in the form of a BA or equivalent, a CPA, or other such certifications.

### **COMPENSATION**

\$80,000 - \$110,000 annually.

For more information please contact:

Kevin Redick  
(415)762-2646 or [kevinr@moppenheim.com](mailto:kevinr@moppenheim.com)

Mark Oppenheim  
(415)762-2640 or [marko@moppenheim.com](mailto:marko@moppenheim.com)

**m/Oppenheim Executive Search**  
San Francisco, CA