

filoli

Controller (PT)

Filoli is a 654-acre historic site of the National Trust for Historic Preservation, located on the San Francisco Bay Peninsula near Woodside, CA, and one of the finest remaining country estates of the early 20th century. As a team member here, you will be able to connect rich history with a vibrant future through beauty, nature and shared stories. You have the opportunity to preserve, build upon and share the wonder of this place.

In our daily interaction with guests, we envision a time when all people honor nature, value unique experiences and appreciate beauty in everyday life. You will also actively play a part in creating a vibrant future through our 2019-2023 Strategic Plan. Embedding the core principles of Diversity & Inclusivity, Sustainability and Organizational Excellence into each pillar of the plan, we are focusing on five main pillars of our organization: People & Culture, Fundraising & Financial Strength, Infrastructure Investments, Visibility & Branding and Engagement & Education. We welcome and appreciate your contributions to Filoli.

SUMMARY

The Controller will primarily partner with the Chief Financial Officer, providing leadership in the overall growth, management, and strategic planning of the organization. This position will contribute to the planning, implementing, managing, and controlling of all financial-related activities. The Controller will provide dynamic leadership and guidance to the department managers, C-suite, and Filoli staff and report to the Board and Finance Committee as needed.

This is a part-time, non-exempt position (20-29 hours per week, flexibly scheduled) to include occasionally requested financial committee meetings. Depending on candidate experience, the range for the hourly rate is \$90.00 to \$125.00. Flexibility is important as the schedule may change to meet the needs of the organization. Depending on the project, a hybrid schedule is possible.

ESSENTIAL DUTIES AND RESPONSIBILITIES INCLUDE:

Essential Accounting Functions

- Support CFO and Accounting Manager in providing training and mentorship to accounting staff;
- Support CFO and Accounting Manager to ensure timely and accurate analysis of budgets, financial trends and forecasts, and monthly financial statements/reports for each department;
- Develop and ensure effective internal controls are in place to safeguard assets and ensure compliance with all applicable federal, state and local laws and regulations;
- Oversee certain aspect of revenue-producing activities, including inventory management of the Clock Tower Shop, Visitor & Member Services, Food & Beverage, and all Filoli events;

- Identify, develop and implement best practice improvements to processes and procedures to achieve meaningful results, greater productivity, efficiency and consistency among departments;

Seasonal Accounting Functions

- Lead department-wide and organization-wide projects to implement systems or processes ensuring necessary controls and data integrity;
- Support CFO with accounting, finance, and organization-wide budgets as needed;
- Direct liaison for the annual audit; Responsible to draft the annual financial statements in accordance with generally accepted accounting principles (GAAP);
- Contribute to the senior management team in the development and implementation of organization-wide policies and programs that will contribute to its overall success;
- Prepare robust data to support Board with committees responsible for finance and auditing as needed;

General

- Update job knowledge by participating in education opportunities;
- Protect organization's value by keeping information confidential and securing financial information;
- Provide the highest quality services to all customers in every interaction;
- Uphold all Filoli's policies, procedures, guidelines, and standards;
- Maintain flexibility and perform other duties as assigned to respond to the needs of the organization;
- Attendance and punctuality are essential to work and all work-related functions.

SUPERVISORY RESPONSIBILITIES

Depending on the project, this position will occasionally supervise an Accounting Manager (FT), Accounting Specialist (FT) and an Accounting Clerk (PT).

MINIMUM QUALIFICATIONS

An individual must be able to perform each essential duty listed above and any additional responsibilities as directed as well as satisfy the educational and skill requirements listed below:

Education and/or Experience:

Education: Bachelor's in Accounting or Finance or related discipline required; CPA, MBA or equivalent designation is a plus;

Core Competencies:

- ACCOUNTING EXPERIENCE – Minimum of 10 years of increasing responsibilities in the accounting/finance function and at least half of that time supporting organizations of comparable size to Filoli. Non-profit accounting experience with multiple revenue streams and programs is strongly preferred. Ability to interpret and apply accounting knowledge and understanding of Generally Accepted Accounting Principles. Experience in a fast-paced, high-volume, small team environment.

- PEOPLE, PROJECT, AND PROGRAM SKILLS – At least 5 years of direct supervisory experience of individuals or secondary departments. Effective teamwork skills and cross-functional collaborative capacity. Ability to successfully work independently and in small teams in an organization with high volume transactions. Ability to contribute to and lead projects.
- LEADERSHIP – Flexible, energetic, and outcomes-oriented self-starter who brings a creative approach to solving problems. Capacity to interact effectively and build partnerships with Filoli's many constituencies including staff, Board members, community partners and supporters, donors, members, visitors, and volunteers. Demonstrate effective influence skills. Strong administrative skills. Ability to multitask while maintaining high degree of accuracy, see many sides to complex issues, and perform at high standards with a collegial team. Ability to be responsive to a large number of diverse needs while focusing on high priority tasks.
- CULTURAL COMPETENCIES – Model a responsibility to self-awareness and awareness of others to recognize that individuals bring unique backgrounds, beliefs, values, and world-views. View racial and cultural differences as assets to the organization.
- DIVERSITY, EQUITY, AND INCLUSION – Committed to Filoli's dedication to integrate accountability across all efforts to support and sustain a racially equitable organization. Demonstrate a passion of advancing organizational DEAI objectives and influencing others to approach all work with an equity lens. Promote processes and communication that encourage organizational cultural competence and inclusion.
- COMMUNICATION SKILLS – Superior oral and written communication skills including making presentations to large and small groups. Ability to facilitate conversations to achieve consensus.
- DECISIVE NATURE – Well-honed ability to independently anticipate and analyze situations, define problems and objectives, recognize viable alternatives and formulate rapid solutions with understanding of the inherent risks and the implications of decisions.
- COMPUTER SKILLS – High proficiency with Windows, Microsoft Office products, and Google applications. Advanced MS Excel skills. Advanced knowledge of general ledger accounting systems. Current knowledge of Financial Edge NXT, Blackbaud Altru, and Square POS is a big plus but not required.
- AVAILABILITY – Maintain a flexible work schedule that includes seasonal peaks to meet the demands of executive management. Depending on projects, a hybrid schedule is possible.

Skills and Abilities:

- Ability to display a high level of integrity and dependability with a strong sense of customer service, urgency, results-orientation, diplomacy and confidence;
- Ability to take feedback and make constructive adjustments to programs, processes, and communications;
- Ability to think and act strategically, and promptly respond to tactical questions, concerns, and problems either via email, phone or in person;
- Ability to provide solid analytical skills working with quantitative data, organize information effectively and provide useful data;
- Ability to follow-through to successful completion all projects and communications;
- Ability to demonstrate consistent and predictable punctuality, attendance and dependability;
- Read and interpret documents such as safety rules, operating and maintenance instructions, and procedural manuals.

CERTIFICATES, LICENSES, REGISTRATIONS

A valid Driver's License is required.

PHYSICAL REQUIREMENTS

The physical requirements described here are representative of those that must be met by an employee to successfully perform the essential functions of this job including:

- Lift/carry items up to 20 pounds;
- Stand, walk across uneven terrain, climb stairs, reach, lift, carry and bend as well as sit for long periods at a computer.

HOW TO APPLY

1. Candidates with the above prerequisites are invited to submit their resumes along with a cover letter outlining their related experience and background to:
<https://filoli.applicantstack.com/x/openings>
2. Possession of minimum requirements does not guarantee an interview.
3. Please, no phone calls.
4. Thank you for your interest in Filoli!

Please visit our website for more information: www.filoli.org

Filoli is an equal opportunity employer who values diversity in the workplace.