



Controller

Filoli is a 654-acre historic site of the National Trust for Historic Preservation, located on the San Francisco Bay Peninsula near Woodside, CA. As a team member here, you have the opportunity to preserve, build upon and share the wonders of this designation.

In our daily interaction with guests, we envision a time when all people honor nature, value unique experiences and appreciate beauty in everyday life. In this position, you will engage in our 2024 - 2028 Strategic Plan, which is centered on connecting to our community and providing Filoli guests greater access to nature.

Filoli's culture is rooted in integrity and we are accountable for our work, actions, and impact on our visitors, community, and environment. Through our values, Filoli Team members are committed to being Inclusive, Welcoming, Innovative, Collaborative, and committed Stewards using sustainable practices for the future.

SUMMARY

We are looking for a Controller to manage and optimize the financial operations and ensure financial efficiency. Partnering with the Chief Financial Officer (CFO) and his Finance team, the Controller will provide dynamic leadership in managing the financial health and integrity of the organization. This position will contribute to the financial planning and analysis, control and efficiency implementations, and management of all financial-related reporting and cash flow activities. The Controller will also provide financial and operational guidance to various department managers, C-suite members and Board Committees as necessary and appropriate.

This is a full-time, exempt position managing a team of accountants and senior accounting manager. Depending on candidate experience, the salary range is \$160,000 to \$196,000. Strong technical accounting knowledge and excellent problem solving skills, with forward looking ability to anticipate potential financial and operational issues is essential.

ESSENTIAL DUTIES AND RESPONSIBILITIES INCLUDE:

Essential Accounting Functions

- Manage the finance and accounting team to ensure timely and accurate preparation of financial reports.
- Partner with operating teams to ensure accurate recognition of revenue-producing and inventory activities.

- Coordinate with the management team in analyzing operational and financial data to support strategic decisions.
- Drive process improvements and scalability in financial systems to achieve greater productivity, efficiency and consistency among departments.
- Coordinate the annual departmental budgeting and mid-year forecasting process.
- Direct liaison for the annual audit; responsible for drafting the annual financial reports and statements.
- Lead department-wide and organization-wide projects to implement systems or processes ensuring necessary controls and data integrity;
- Contribute to the senior management team in the development and implementation of organization-wide policies and programs that will contribute to its overall success

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.

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. CPA, MBA or equivalent designation is a plus.

Core Competencies:

- **ACCOUNTING EXPERIENCE** – Minimum of 10 years of increasing responsibilities in the accounting/finance function. 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.
- **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 many constituencies including staff, Board members, community partners and supporters, donors, members, visitors, and volunteers.

- 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 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.

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 frequently 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.