

# Greater Tacoma Community Foundation Job Opening



Job Title: <b>CONTROLLER</b>	Date Prepared: <b>May 2018</b>
Incumbent Name:	Department: <b>Finance/Accounting</b>
Position Reports to (Title): <b>CFO</b>	FLSA Status: <b>Exempt</b>
Roles that Reports to this position (Titles): <b>SENIOR ACCOUNTANT</b>	

About Greater Tacoma Community Foundation: Created in 1981 by a group of nine caring and compassionate community members, Greater Tacoma Community Foundation (GTCF) has grown from one gift of \$10,000 to a robust organization supporting thousands of nonprofits partners in the South Puget Sound. In 36 years of operation, we provided more than \$100 million in grants to the Pierce County community due in part to the generosity of our donors.

GTCF has helped hundreds of social entrepreneurs and nonprofit leaders reshape our community through arts and culture, basic needs services, education, after-school programs for youth, environmental initiatives, empowerment opportunities for women and girls, and much more. Our focus has and will be on making a measurable impact on key community issues through collaborative efforts that ensure our communities thrive for generations to come.

Our Team: We are a relatively small but mighty team committed to delivering the highest quality philanthropic services for the greater community, our donors, and our nonprofit partners. We believe our people talents are at the heart of creating meaningful community opportunities and results. Our values guide our decision-making and our strategies ensure we are intentional in maximizing our efforts to serve people with diverse ideas, cultures, and backgrounds in meaningful ways. We value people with open hearts and open minds who can create a warm, inviting, and transformational experience for all people.

Mission: Strengthening our community by fostering generosity and connecting people who care with causes that matter.

Vision: Greater Tacoma Community Foundation visualizes Pierce County as a vibrant, compassionate, and beautiful community where people and programs work in harmony to provide personal, organizational, and environmental prosperity. GTCF will be a leader in the development of this vision by providing expertise, innovation, and inspiration for community members to connect personal and family values with powerful long-term community impact through philanthropy.

Values: Integrity, Leadership, Innovation, Collaboration

**Job Purpose:**

The Controller is responsible for administration of financial systems and monthly accounting practices including preparation of accurate and timely financial data for financial reporting and management uses, financial systems and process development, as well as the administrative functions of payroll, benefits, insurance, and taxes.

The Controller plays a key role in supporting GTCF's staff to ensure friendly, timely, and accurate information to both internal and external clients. The Controller manages, trains, and provides guidance to the Sr. Accountant who performs the majority of the daily financial tasks.

<b>Key Job Functions:</b>	<b>% of Time Spent on Function on an Annualized Basis</b>
1. Monthly Financial Accounting	40%
2. Reporting and Statement Preparation	30%
3. Human Resource, Employee Benefits and Payroll Administration	10%
4. Information Technology	10%
5. Gifts and Pledges	10%

**Primary Roles, Responsibilities:****Monthly Financial Accounting**

- Provide oversight, training and review of AP, AR, P/R, GL, reconciliation, grants and fund accounting duties of the Sr. Accountant
- Plan and coordinate month-end-close, including accurate preparation and review of JEs and reconciliation of accounts
- Ensure accurate records and reporting for vendors including collecting W-9s, 1099s and 1096s at year end
- Make sure all account detail is reconciled monthly to control accounts
- Oversee disbursements, including AP, grant/scholarships
- Determine cash flow needs and process related transactions

**Prepare and submit timely state and local tax and license reporting **Financial and Reporting****

- Prepare monthly and quarterly financial and management reports, including but not limited to Statement of Activities, Statement of Financial Position, forecasts, cash flow forecasts, variance reports, and related analysis.
- Support work of the Investment, Audit and Finance committees
- Assist CFO in preparation of the annual budget
- Calculate and record administrative fees and annual spending amounts
- Prepare and oversee the preparation of work papers for the annual audit including the adjusted consolidated trial balance and footnotes.
- Plan and coordinate preparation of the Form 990 return and related supporting schedules
- Prepare and issue Quarterly Fund Statements Collaborate with Program, Development and Communication staff to prepare and monitor departmental budgets

- Maintain records for Charitable Remainder Unitrusts and Charitable Gift Annuities and oversee the processing of quarterly payments with cover letter

### **Bank and Investment Reconciliations**

- Review activity and reconciliation of checking and investment accounts monthly
- Review allocations of unitized investment returns to each of the funds in the FIMS FACTS module
- Communicate with investment advisors and managers

### **Human Resource, Employee Benefits and Payroll Administration**

- Work with CFO to identify and establish comprehensive, competitive, cost conscious benefit package.
- Oversee the calculation and processing of payroll deductions and recording of payroll transactions in accounting systems
- Oversee the maintenance of organized and accurate employee records, including employee files and databases. Track and update employee census data
- Assist in the onboarding of new hires, including benefits and payroll paperwork and enrollment as needed
- Provide information to staff related to employee benefits
- Develop accounting policies and procedures to provide adequate internal controls
- Coach/train other staff members as needed in performing their duties according to the Accounting Policies and Procedures Manual

### **Information Technology**

- Maintain inventory of computer equipment, services, licenses; acquire hardware and software and arrange for installation as needed.
- Arrange for additions, deletions, upgrades and patches to FIMS and other software
- Orient and train new staff on computer network system including password security, log-on procedures and remote access
- Maintain the IT portion of the Disaster Recovery Plan

### **Gifts and Pledges**

- Oversee the Senior Administrative Manager in gift and pledge payment entry
- Review daily gift entry for accuracy, recommend corrections as necessary, and post.
- Manage pledges payable, including maintain and monitor credit card processing system for recurring pledge payments
- Work with staff to monitor accounts receivable - identify and process write-offs

### **Skills Required/Experience**

- Bachelor's degree in Accounting/Business is required. CPA designation desired
- At least ten years of professional level accounting and finance experience, with 3 years' experience as a controller of a similarly sized organization including experience in fund accounting.
- Experience providing support for human resources issues in a small team, including benefits, payroll and compliance requirements.
- Excellent interpersonal and communication skills. Must be able to work within all levels of the organization and successfully deliver information and recommendations to executives.

- Ability to work under pressure and achieve required deadlines.
- Demonstrated ability to work successfully in a team environment.
- Excellent interpersonal skills and ability to work collaboratively and effectively with individuals of diverse backgrounds.

#### **Preferred Experience and background**

- Nonprofit and/or Foundation experience
- CPA with audit experience
- Supervisory skills

#### **Working Conditions**

GTCF offers many great benefits to its employees, including: a competitive salary; bonus pool opportunities; healthcare; generous retirement plan contributions; paid parking; paid vacation, holidays and sick time; continuing education opportunities; a fully-stocked kitchen with beverages and tasty snacks; and much more.

Greater Tacoma Community Foundation is an Equal Opportunity Employer.

#### **APPLICATION PROCESS**

- Please submit a cover letter describing why this role is aligned to your background, skills and interest
- Current resume
- Materials are to be submitted via email - [hr@gpcf.org](mailto:hr@gpcf.org)
- References will be requested from final candidates

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