



since 1979

CONTROLLER Job Description

Waldorf Education is the fastest growing independent school movement in the world. This dynamic, 100-year-old approach to child development and education—based on the teachings of Rudolf Steiner—is continually reinventing itself to meet the needs of current students. Waldorf education inspires life-long learning in students and enables them to fully develop their unique capacities.

The San Francisco Waldorf School (SFWS) was founded in 1979 and serves more than 475 students across a parent-child program, a nursery program, kindergarten, and the first through twelfth grades. Our grade school campus (nursery through eighth grade) is in a quiet residential area of Pacific Heights. The high school campus is located across town in the West Portal neighborhood.

The San Francisco Waldorf School hires dedicated and highly capable faculty and staff; many are current or former parents of students in the school and all develop a deep connection to Waldorf education and our unique school in San Francisco. SFWS employees are a committed group of free, responsible adults who bring our best individual selves to our work.

SFWS asks all employees to proactively commit to diversity, equity, and inclusion, personal improvement, and service to the SFWS mission, bringing energy and excitement to serve all students, faculty, and families of the school.

Summary

SFWS is looking for a Controller to join the four-person Business Office. This is a full-time, exempt, staff position reporting to the Director of Finance and Operations. The position requires managing processes and financial software; developing standards; tracking budget expenses; analyzing complex and changing information; supporting budget development and use of various financial skills and insights. Key responsibilities are below.

Key responsibilities

Accounting

- Manage school's accounting effort; oversee accounting process, including accounts receivable, accounts payable, payroll and compliance
- Manage year-end closing including annual year-end audit

Tuition Contracts and Financial Aid (Affordable Tuition Program)

- Manage the enrollment and tuition contract process (new and returning students), including regular review and revision of contract language
- Manage the integration of contract payment terms and payments with FACTS Management, the School's tuition management vendor
- Manage the Affordable Tuition Program (ATP), considering the school's policies and mission
- Read and understand tax forms and other financial documents
- Analyze financial aid applications
- Ensure compliance with application requirements (submission of documentation, deadlines, etc.)

Tuition Account Receivables

- Monitor receivables of tuition, Aftercare and After School Programs using Quickbooks, FACTS Management Inc, EZ Care reports
- Reconcile Quickbooks regularly with AR data with FACTS Management data
- Communicate regularly with parents about payment status

Compliance

- Prepare and submit required filings to national, state, and local governments as necessary, including:
 - Annual Form 5500 to Department of Labor for school's 403(b) retirement plan (by 7/31)
 - Annual Claim for Welfare Exemption to C&C of San Francisco (Form BOE-267-A by 02/10)
 - Annual Environmental Fee Return to State of California (CDTFA-501-EF by 02/28)
 - Biannual Private School Affidavit with State of California Dept of Education
- Prepare and submit surveys, questionnaires, and information requests from private school organizations

Qualifications and Experience

- Background in accounting
- Experience with auditing and corporate finance
- Proficiency in Quickbooks
- Preferably familiar with FACTS Tuition Management, Blackbaud, School Admin software

Benefits and Compensation

This is a full-time (1FTE), exempt position. Benefits include:

- Medical, dental, and life insurance
- Flexible spending plans
- 403(b) Retirement Plan (employer contributions after one year of employment)
- Tuition remission (after one year of employment) for up to two eligible dependents enrolled in our N-12 program.

Physical Requirements and Work Environment:

- Regularly sitting or standing 4-8 hours
- Be able to occasionally lift 30 lbs.

FLSA Classification: Staff; Exempt
Reports to: Director of Finance and Operations
Date Posted: February 2021

San Francisco Waldorf School is an equal opportunity employer that does not discriminate based on race, ethnicity, age, gender, or any protected class. We recognize that the range of ethnicities, nationalities, languages, socio-economic backgrounds, sexual orientation, learning differences, and life experiences within our community enhance the school's learning environment, and we are committed to fostering equity and inclusion. All minorities are encouraged to apply.

Please send resume and letter of interest to jobs@sfwaldorf.org