



Position Description

Controller

The Organizations

[HealthSpark Foundation](#) is a private, independent foundation. It invests in nonprofit organizations, networks, and coalitions promoting a more just and healthy community. Its work is guided by the principles of racial and social justice, inclusivity, integrity, professionalism, and excellence.

The foundation's work is centered on Montgomery County, PA and is community driven. Since 2017 HealthSpark has been investing in systems level opportunities to build a more financially resilient safety net system that is connected, respected, person-centered, equitable, and impactful. Our collaborative work with a variety of community stakeholders seeks to achieve greater and more lasting impact on the safety net system so it can operate and produce positive, equitable outcomes for all people.

[Community Partners Center](#), the first nonprofit center established in Pennsylvania, is a subsidiary of HealthSpark Foundation. The Center, managed by a separate board of managers appointed by HealthSpark Foundation's board, manages the Center's leasing, operations, and property management activities.

Position Overview

The Controller is charged with managing the day-to-day fiscal operations of HealthSpark Foundation and its subsidiary, 2506 LLC that owns and manages the Community Partners Center. This key individual reports to the president, supports two boards and staff managing and overseeing all investment, financial, audit, tax reporting, and related fiscal activities. The ideal candidate is experienced in nonprofit accounting/financial management and thrives in a highly collaborative culture within an organization that continuously aspires to the highest of standards.

Position Responsibilities

Financial Management

- Manage banking and out-sourced investment portfolio relationships with third parties including distributions from restricted accounts
- Support investment committee and president in overseeing the management of a \$40 million investment portfolio
- Prepare and manage annual budgets for foundation and 2506 LLC
- Provide financial oversight, monitoring and reporting of 2506 LLC revenue, expenses and cash flow including tracking common area maintenance and capitalized expenditures
- Ensure the timely and accurate completion of month-end reporting
- Develop and maintain efficient and effective accounting and financial systems, reporting, budgeting and cash management systems and processes
- Oversee administrative and operational accounting (cash flow analysis and management, grants payment, payroll, payroll taxes, HSA contributions, accounts payable, inventory and purchasing)
- Coordinate and plan for cash requirements with financial advisory and custodian
- Prepare monthly and quarterly financial statements including budget variances and key performance measures

- Consult with auditor seeking clarification on issues related to spending policy, taxation, investment accounting, etc.
- Lead annual audit, assist with preparation of IRS Form 990-PF tax return including creation of all workpapers, documents and narratives in coordination with board committee
- Monitor and ensure compliance with all external agencies (e.g., IRS minimum distribution; PA Bureau of Charitable Organizations; Annual Form 5500 and Quarterly census reports to U S Labor Dept.; HealthSpark sales tax exemption filing)
- Monitor the mortgage and its underlining SWAP performance
- Manage insurance relationships (coverage review, renewal, and claims)

Other duties

- Manage and supervise one direct report (Business Administration Manager)
- Manage technology needs and planning (computers, phones, URL registration/renewal)
- Oversee records retention activities
- Human Resource benefit management (health, life & retirement plans; employee notices (workers' comp, 401(k), HSA benefits, etc.)
- Submit comparative salary information to state and philanthropic partners
- Assist former hospital employees seeking retirement information
- Oversee and assist with preparation of board meeting materials

Professional Qualifications

- Bachelor's Degree is required; MBA and/or CPA preferred
- Minimum five years of prior nonprofit accounting experience in a professional office setting
- Experience implementing Modern Portfolio Management Theory and managing an endowment.
- Prior nonprofit audit experience preferred
- Private foundation experience a plus
- Proficiency with Microsoft Suite applications (Office 365, Word, Excel, Power Point)
- Proficiency in the use of QuickBooks
- Familiarity with Foundant and its interface with QuickBooks a plus
- Familiarity with database management, customer relations management software a plus

Personal Traits

- Exceptional interpersonal and relationship building skills
- Results-oriented/accountable/proactive leadership– ability to lead by example
- Energized, motivated, disciplined and engaged to work independently with minimal supervision
- Must assume a sense of “ownership” of his/her assignments, be responsive, have timely and accurate follow-through, and move quickly and decisively using sound judgment and problem-solving skills
- Strong organizational skills with the ability to multi-task, prioritize workload, and to take projects through to conclusion under deadline
- Willingness and ability to occasionally work evenings and attend meetings outside normal business hours

FLSA Status: Exempt

[Dunleavy & Associates](http://bit.ly/HealthSparkFoundation) has been retained by HealthSpark Foundation as their partner for this search. All interested candidates should submit a resume and cover letter via the following link:

<http://bit.ly/HealthSparkFoundation>

The cover letter should include the following elements:

- Why you are interested in the position and HealthSpark Foundation
- Any additional professional and/or personal experience that informs your qualifications for the position that otherwise is not obvious from your resume.

Please direct specific questions to Patty Cook, Managing Director, Dunleavy & Associates at pcook@matchingmissions.com

HealthSpark Foundation is committed to the principles of equal opportunity employment at every level without regard to race, color, religion, national origin, sex, marital or familial status, sexual orientation, gender identity characteristics or expression, age, veteran status, non-job related disability, or political affiliation.