

EDUCAUSE

UNCOMMON THINKING
FOR THE COMMON GOOD



POSITION PROFILE

Controller

(Remote Position)


June 2022

In partnership with Summit Search Solutions, Inc.



EDUCAUSE is seeking an experienced and strategic individual to join its team as Controller. EDUCAUSE is an international nonprofit association whose mission is to advance higher education through technology innovation—equipping its community with the knowledge, resources, and community-building opportunities needed to help shape strategic technology decisions at every level in higher education.

Diversity in viewpoints and experience is particularly sought in candidates—EDUCAUSE believes in the transformative power of uncommon thinking for the common good.



EDUCAUSE is a nonprofit association that advances higher education through technology innovation.

ABOUT EDUCAUSE

EDUCAUSE helps those who lead, manage, and use technology to shape strategic decisions at every level. EDUCAUSE actively engages with colleges and universities, corporations, foundations, government, and other nonprofit organizations to advance technology innovation—of particular importance over the last two years, when technology has been a pandemic lifeline across the globe.

Through its many programs, services, publications, resources, and activities, EDUCAUSE and its members contribute to and elevate the international conversations related to the strategic role of technology in higher education, working to clarify the current environment, identify emerging trends and effective practices, and influencing the evolution of technology innovation in higher education.

Counting nearly 1700 colleges and universities as members, EDUCAUSE is at the crossroads of important higher education issues, and active individual members in the community span campus units, divisions, and roles, including enterprise IT, teaching and learning, cybersecurity, and more.

Membership is open to institutions of higher education, corporations serving the higher education information technology market, and other related associations and organizations. While the majority of EDUCAUSE members are located in North America, many of these institutions have a worldwide footprint, and a large proportion of member institutions are international.

Formed in 1998, EDUCAUSE was created through the merger of two organizations, CAUSE and Educom, comprising six decades of service to the thriving higher education technology community.

Present Organization

Established in Washington, D.C., EDUCAUSE is an organization of 80 employees who work remotely, distributed throughout 20+ states in the U.S. Prior to the 2020 workforce shift to remote staffing, half its workforce worked from home. In 2020, with the full support of the board, EDUCAUSE closed its office in Louisville, Colorado, to become a permanently fully distributed organization.

Leadership

EDUCAUSE senior leadership provides strategic and tactical guidance for the association, working with the EDUCAUSE board to serve its community of colleges, universities, and other organizations. [Click here](#) for more information about the leadership of EDUCAUSE and its organizational structure. EDUCAUSE is organized by departments and teams with each vice president overseeing the management of, and responsible for the outcomes of, a significant area of practice and/or operations within the association.

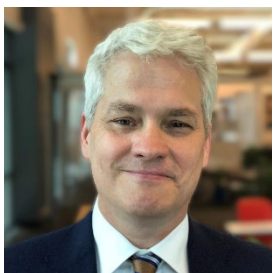


The EDUCAUSE Controller reports to the EDUCAUSE vice president and chief financial officer, Nycole M. Joiner, CAE. An accomplished nonprofit CFO, Nycole has over 25 years of progressive experience in association management and finance leadership. Her diverse experience includes leadership of finance and operations teams, strategic work with board committees, and development of operational strategies and tactical plans for associations and other nonprofit organizations. Prior to joining EDUCAUSE, Nycole was the VP of finance and head of central education and events with the Healthcare Businesswomen's Association. She also worked in higher education as the director of finance for a small not-

for-profit university in Fairfax, VA, and as an adjunct faculty member for a small private college in Annapolis, MD. Nycole served on the board of Women in Ethics and Compliance – Global, as the board treasurer and helped lead the organization's strategic planning, governance, and operation functions. Nycole is a Certified Association Executive and holds a master of science degree in accounting with an emphasis in accounting information systems from Strayer University. She earned a bachelor of science degree in accounting from Morgan State University.

*"EDUCAUSE is an association in every way powered by relationships. We depend on hundreds of volunteers every year to make the kind of difference we do, and **we know that partnerships with other organizations are more important than ever before.** We can do more together than we can do alone—and there's much more we want to accomplish in the years ahead for the members we serve."*

~John O'Brien, President and CEO, EDUCAUSE



John O'Brien is responsible for leading EDUCAUSE in its mission. He directs all activities and functions and works with the EDUCAUSE board to ensure stewardship, transparency, and accountability in service to nearly 1700 member colleges, universities, and organizations from 45 countries who themselves collectively serve over 16 million students. In his role as CEO, he speaks and writes about higher education, technology, and the crucial intersection where the two meet. Throughout his career in higher education, O'Brien has served as a faculty leader in instructional technology, a statewide IT project leader, and associate vice chancellor/deputy CIO at the system level. He has been a college provost and president in the Minnesota State Colleges and Universities system, the fourth largest higher education system in the United States with over 375,000 students. Prior to his appointment at EDUCAUSE, he served as the system's senior vice chancellor of academic and student affairs. O'Brien holds a bachelor's degree in English from Augustana University, a master's degree in Anglo-Irish Literature from the University of Dublin (Trinity College), and a doctorate in English from the University of Minnesota.

Governance

The EDUCAUSE Board of Directors provides governance, sets strategic directions, and helps the association anticipate emerging issues. Board members work together to advance EDUCAUSE and higher education IT, serving as the voice of community members and ensuring that the association is responsive to the needs of its diverse community. [Click here](#) to learn more about the BOD.

Commitment to Diversity, Equity, and Inclusion

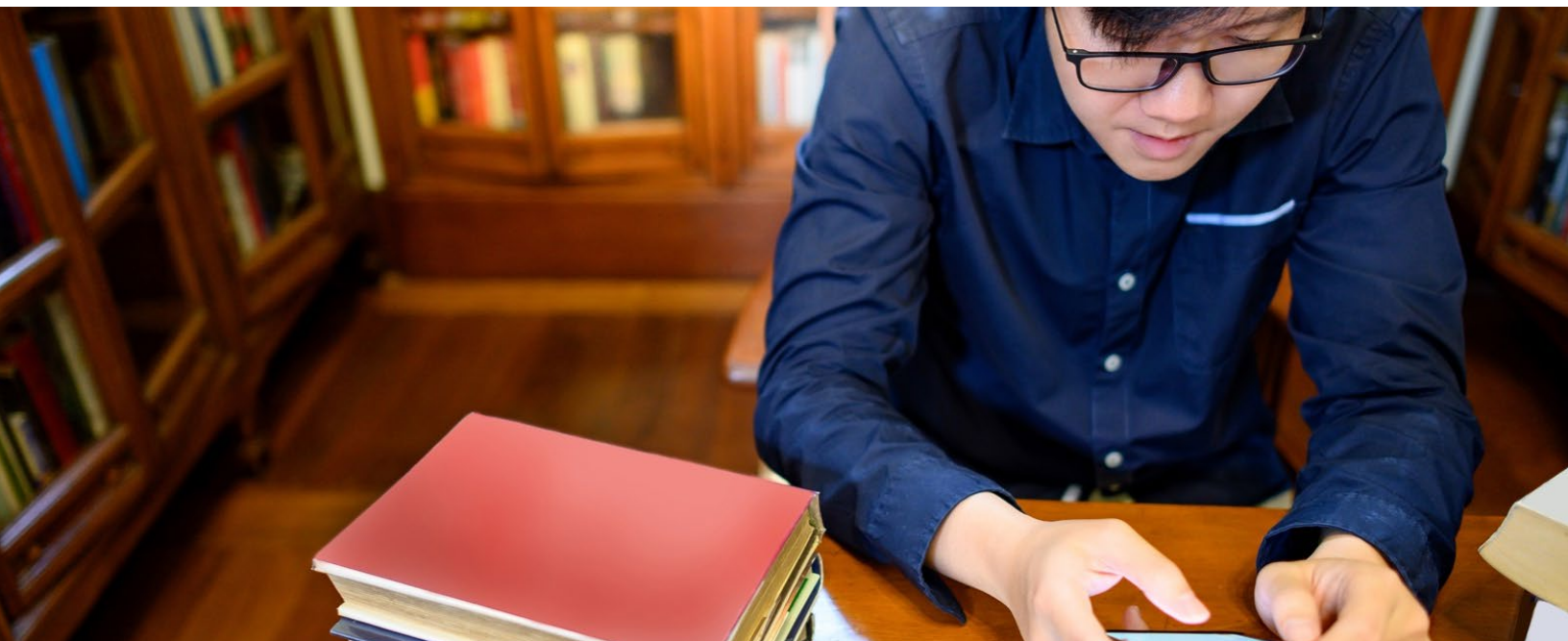
The EDUCAUSE Board and leadership have established diversity, equity, and inclusion (DEI) as a critical priority for the association. Research demonstrates that diverse communities and teams are more resilient, creative, and effective; however, far too few IT and academic technology organizations reflect the diversity of the constituents their institutions serve. In fact, higher education IT in general, lags national trends in employment for underrepresented groups. EDUCAUSE believes that inclusive and equitable organizations will be best positioned to attract the caliber of talent needed in the years ahead and better achieve their institutional objectives.

EDUCAUSE recognizes that long-term and lasting progress will require time, sustained effort, and the cumulative impact of incremental and individual actions, and the association is committed to making measurable progress advancing DEI.

- EDUCAUSE will help the higher education technology community build the capabilities needed to engender diversity, equity, and inclusion in their organizations and institutions.
- EDUCAUSE will integrate an intentional DEI focus into the fabric of the EDUCAUSE member experience.
- EDUCAUSE will, as a result of existing, improved, and new initiatives, realize a more diverse community of higher education technology professionals.
- EDUCAUSE will, as an employer, seek to improve its own DEI capabilities and actively encourage diverse candidates to apply for staff opportunities.

[Click here](#) to learn more about how EDUCAUSE supports DEI efforts on member campuses.

Strategic Priorities EDUCAUSE takes planning seriously, and the association is currently engaged in updating its mission, vision, and values, as well as determining an exciting new set of strategic priorities for the next 3-5 years.





CEOs of the EDUCAUSE, NACUBO, and the Association for Institutional Research partner meeting on analytics

Educause Strategic Partnerships

EDUCAUSE recognizes that more can be accomplished through strategic partnerships than working alone, and the association actively seeks partnerships to broaden its reach and enrich its programs in ways that support the association's core mission, goals, and strategic priorities. Strategic partners may be individuals, associations, institutions, corporations, foundations, or other organizations, worldwide. EDUCAUSE partnerships have helped to advance several topics, including these:

- **Student Success**—Clarifying the uses and challenges of data and analytics
- **Teaching and Learning**—Contributing to a collaboration to build higher education's capabilities to apply XR technologies in teaching
- **Cybersecurity**—Raising awareness and sharing best practices
- **Executive Collaboration**—Co-hosted events to foster greater understanding between IT and higher education executives
- **Digital Transformation**—Raising awareness about how digital transformation can benefit higher education
- **Analytics Progress**—Helping institutional leaders make progress on analytics
- **Decision Support**—Helping campuses navigate the many solutions and find what will work best

Learn More About EDUCAUSE

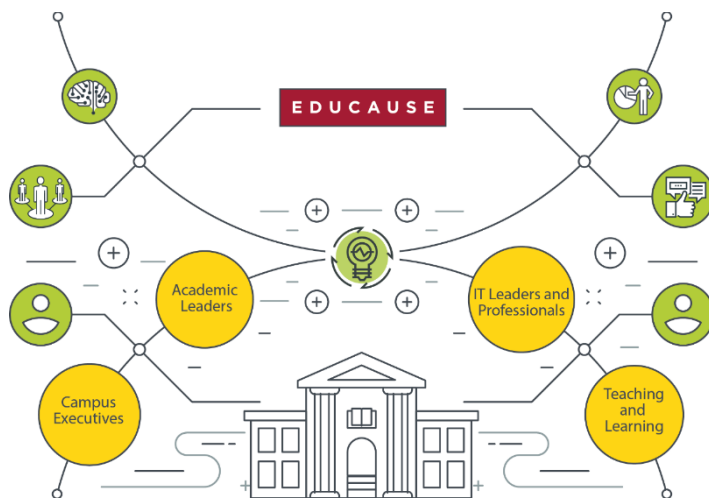
- *EDUCAUSE Review* is the flagship publication of the association. Candidates can get a good view into the topics that capture the imagination of the community looking through the 20+ years of [magazine archives](#). *EDUCAUSE Review* recently became fully digital.
- The [EDUCAUSE CIO Commitment Statement](#), with over 600 signatures, is a powerful example of the work the association does to support diversity, equity, and inclusion in the broader higher education community.
- The EDUCAUSE [Digital Transformation Journey Map](#) is an example of a resource made available to member campuses to help technology professionals lead the way on their local digital transformation journey.

Who Is Served?

At its core, EDUCAUSE was built by and for a strong community of technology professionals. The strength of EDUCAUSE is *both* the shared belief in promise of technology innovation and the broadly diverse kinds of members and perspectives. EDUCAUSE members include nearly 1700 colleges and universities that, in turn, serve over 14 million students, changing lives and enriching communities as a result.



The history of EDUCAUSE is deeply focused on information technology units and the unique challenges that come with this portfolio; the EDUCAUSE of today spans a wide variety of responsibilities, roles, and job titles.



Who Uses EDUCAUSE On Campus?



Strengthening Higher Education Together

EDUCAUSE thanks our 2019 Corporate Partners for playing a meaningful role in helping higher education deliver on its mission!



DELL EMC

ellucian.

Gartner.

Google



JENZABAR

Microsoft

ORACLE

workday.
Built for the future.



aws

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MANAGEMENT

CDWG PEOPLE
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CISCO

CITRIX

EPSON
EXCEED YOUR VISION

HURON

IBM

Laserfiche
Run Smarter

LogMeIn
Be Limitless.

mediasite

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TECHNOLOGY CONSULTING

Pearson

Steelcase
EDUCATION

UNIT4



Blackboard

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D2L
DESIRE2LEARN

Deloitte.

Dropbox

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FISCHER
Identity Management
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INDUSTRIES INC.

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Enterprise

APPSIAN

AVI & SPL

blackbaud

canvas

DLT

echo

ExLibris
campusM

LinkedIn LEARNING

macmillan
learning

Mc
Graw
Hill
Education

m. mersive
technologies inc.

nelnet
CAMPUS COMMERCE

RUCKUS
an axtel company

SMARTDESKS
where design meets technology

Spectrum
ENTERPRISE

SurveyMonkey

Unified

vaddio

VEEAM

watermark

We also thank 375+ additional corporations that support our community.
edUCAUSE.edu/corporate-partners

EDUCAUSE



THE OPPORTUNITY Controller

The Controller coordinates accounting policies and procedures while overseeing the implementation of processes and programs within the Accounting Department. The Controller has authority over the day-to-day operations of the department including monthly close, financial statement preparation, budgeting, grant management, and independent financial audits. The Controller represents the department by providing essential communication to the CFO and departmental stakeholders to enhance the effective functioning of financial systems, controls, and processes.

Essential Duties and Responsibilities

Financial Operations Administration:

- Monitors cash flow and expenditures relative to budget.
- Interacts on behalf of the department with management and executives; acts as liaison with the Board of Directors when appropriate or assigned as part of the Audit and Finance/Investment Committees.
- Prepares monthly financial summary report for management.
- Oversees accounting and other business software as necessary for financial management, reporting, and effective functioning of the department.
- Facilitates fiscal planning and financial analyses to assure plans are in place in the current and future budget year(s).
- Manages and ensures financial compliance with compensation and benefits.
- Manages and tracks program budgets; oversees appropriate documentation; identifies and resolves issues with reporting; identifies opportunities to improve financial position; assure correct cost and revenue allocations.
- Assists with administration of the retirement plan as a member of the Fiduciary Committee; reconciles retirement withholdings, matching, and remittances.
- Administers Concur AP Automation, reviews invoices for correct coding, approves payment, and imports transaction detail to accounting system.
- Administers purchasing card program and reviews transactions for correct coding and compliance with policy.
- Onboards new employees and trains supervisors on financial policies and procedures.

Grants and Contracts Administration:

- Manages contracts using Agiloft contract management software and assures that appropriate fiscal compliance policies and procedures are in place.
- Evaluates independent contractor status relative to state and federal laws.
- Assists with vendor selection as needed, including requests for proposals.
- Negotiates with vendors, including banks, to obtain favorable rates.
- Manages grants by reviewing budget and progress reports, tracking expenses, assisting with projections, and coordinating with the employee liaison.

Legal/Policy Coordination:

- Acts as the resource for the determination and application of EDUCAUSE fiscal policies and procedures as well as being knowledgeable of state and federal laws and standards.
- Utilizes appropriate counsel to clarify legal issues or concerns.
- Assesses enterprise risk and proposes mitigation measures as needed.
- Responsible for all privacy-related initiatives and inquiries.

Audits and Reports:

- Directs and oversees monthly close and financial statement preparation by approving all journal entries, reviewing account balances and reconciliations, and researching variances compared to budget and prior year.
- Assists in the annual budget process through financial forecasting, review of budget inputs including capital projects, and discussion with key stakeholders.
- Manages the annual independent financial audit and form 990 through preparation of financial statements, account reconciliations, supporting schedules and other documentation.
- Supports the annual independent 403(b) audit and form 5500 through preparation of financial statements, census report, and supporting schedules.

Performance Management and Employee Supervision:

- Directly supervises departmental staff accountants.
- Assures appropriate processes and procedures are in place to optimize fiscal operations and carry out day-to-day activities.
- Conducts training, corrective action, performance discussions, coaching, annual reviews, and terminations for finance personnel.

Service and Support:

- Represents EDUCAUSE in a professional manner at all times; engages with co-workers, volunteers, and members in a civil, caring, respectful way.
- Supports the professional development of others in their work to advance the mission and vision of EDUCAUSE.
- Participate in EDUCAUSE events and activities as needed. Travel may be required to support EDUCAUSE conferences/events, research team operations, and external events relevant to the position.
- Acts as a departmental liaison with employees, members, volunteers, volunteer groups, and clients.
- Supports members in a manner that facilitates their growth, engagement, and enhances their EDUCAUSE experience.
- As a frontline user of EDUCAUSE systems and data services, complies with data quality standards; adheres to data governance policies, procedures, and processes for ensuring data integrity. May act as the application or data collection lead for the department.
- Performs other duties as assigned.

Diversity, Equity, and Inclusion:

EDUCAUSE recognizes that the unique backgrounds, talents, skills, and contributions of every individual improve and enhance the quality of the organization. Creating an environment of equity and inclusion is each employee's responsibility. This includes, but is not limited to:

- Treat everyone with dignity, respect, and fairness.
- Share insights and input as work contributor.
- Listen to and acknowledge others' contributions.
- Contribute to an open and inclusive environment across demographic categories and physical locations.
- Meet others at their point of need and help support organizational achievement.
- As a supervisor, ensure everyone's input is heard and considered.

Qualifications

Education and Experience:

- Requires a Bachelor's Degree in Accounting, Finance, Business Administration, or related field of study.
- A minimum of five years of progressive professional management and financial experience preferably in an academic or nonprofit environment.

Knowledge, Skills, and Abilities:

- High-level experience in managing complex financial reporting, forecasting, budgeting, analysis and planning.
- Knowledge, experience and ability to manage complex information and computer systems.
- Experienced in the supervision of personnel.
- Effective communication/presentation skills and a proven track record of forming collaborative and effective working relationships with staff and external parties.
- Must be detail-oriented with excellent communication skills.
- Ability to act and operate with minimal daily supervision.
- Experience coordinating financial audits including preparation of financial statements and related tax forms.
- Experience with Microsoft Dynamics GP desired.
- Intermediate knowledge of Microsoft Office; strong Excel skills expected.
- Familiarity with state-of-the-art technologies enabling remote work and communication.
- Working knowledge of database management; experience in a multiple server environment preferred.
- Experience with grant administration.
- Requires consistently sound judgment.

Some travel is required to support EDUCAUSE events, meet with the board, and participate in team meetings. The salary range is \$100,000 - \$115,000 and placement within this range is subject to experience and qualifications.





PROCEDURE FOR CANDIDACY

Confidential review of applications will begin immediately and continue until the position is filled; for best consideration, apply by **July 29, 2022**. Please submit a PDF version of your resume and a letter of interest explaining your suitability for this position.

To apply online, go to: <https://theapplicantmanager.com/jobs?pos=su310>

For more information or to offer recommendations:

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EDUCAUSE recognizes that the diverse backgrounds, talents, skills, and contributions of every individual improve and enhance the quality of the organization. EDUCAUSE is an equal opportunity/affirmative action employer with a strong commitment to diversity, equity, and inclusion. EDUCAUSE prohibits discrimination on the basis of race, color, religion, sex, age, national origin, sexual orientation, gender identity or expression, disability, veteran status, marital status, or any other legally protected status. **Applications by members of all underrepresented groups are encouraged.**



[Summit Search Solutions, Inc.](#) is a boutique executive search firm dedicated to serving the education and nonprofit sectors nationwide. Summit has a team of experienced recruiting consultants in strategic locations across the country including California, Kansas, Maryland, New York, North Carolina, and Utah.