



# FINANCE & OPERATIONS DIRECTOR

The Southern Association of Independent Schools (SAIS) seeks a skilled and dependable **Finance & Operations Director** to oversee the organization's financial management and core business operations. This role is ideal for a highly capable professional who enjoys working both independently and collaboratively, ensuring smooth day-to-day operations while supporting the mission of SAIS.

This position manages accounting, compliance, HR processes, and benefits administration while providing accurate and timely financial information to SAIS leadership. This position combines hands-on work with opportunities to improve processes and systems that strengthen the organization.

SAIS serves over 395 independent schools across the Southeastern United States, Latin America, and the Caribbean--providing accreditation services, research, professional learning, and resources that help schools and their leaders thrive.

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## Core Responsibilities

### 1. Accounting & Financial Operations

*Ensure accuracy, transparency, and efficiency in financial management.*

- **Accounts Payable & Receivable**
    - Oversee and process A/P & A/R using Bill.com, Novi AMS, and QuickBooks.
    - Review and clear undeposited funds account.
  - **Journal Entries & Monthly Close**
    - Record journal entries for investments, payroll, benefits, and other recurring items.
    - Review deferred and prepaid items on the balance sheet and journalize quarterly.
  - **Financial Reporting**
    - Produce monthly financial statements with clear analysis.
    - Draft, manage, and monitor the annual budget.
    - Monitor and report on event profitability and revenue streams.
  - **Cash Management**
    - Track and reconcile cash balances.
    - Manage Stripe deposits for career center transactions.
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## 2. Compliance, Audit, & Year-End Activities

*Maintain compliance with legal, regulatory, and audit standards.*

- Prepare and upload work papers for the annual audit.
  - Partner with auditors on preparation of Form 990 and Form 5500.
  - Coordinate tax and retirement filings, annual Secretary of State documentation, and other regulatory requirements.
  - Manage organizational insurance policies, including renewals and RFPs.
  - Lead year-end tasks such as:
    - Issuing W-2s and 1099s.
    - Updating payroll deductions and unemployment rates.
    - Refreshing mileage reimbursement rates and emergency contact lists.
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## 3. Human Resources & Employee Support

*Support the SAIS team through accurate payroll and benefit management.*

- Prepare semi-monthly payroll, including retirement and HSA contributions.
  - Manage employee benefits, PTO tracking, insurance renewals, and onboarding paperwork.
  - Conduct annual workers' comp audit and renewal.
  - Track and allocate functional costs accurately.
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## 4. Support for Leadership & Board

*Provide accurate information and tools to guide decisions and transparency.*

- Prepare clear financial reports for leadership and board meetings.
  - Provide insight on budget progress and operational trends.
  - Assist president and executive vice president with financial planning and reporting needs.
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## 5. Technology & Systems

*Improve operational efficiency and data accuracy through strong systems management.*

- Manage and maintain core systems: QuickBooks, Bill.com, Novi AMS.
  - Seek opportunities to improve workflows and reporting through technology.
  - Ensure security and integrity of financial data.
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# Qualifications & Attributes

## Education & Experience

- Bachelor's degree in accounting or related field (or equivalent experience).
- Experience with nonprofit accounting, preferably in association management.
- Proficiency with QuickBooks, payroll processing, and Office 365.
- Comfort with learning and using new technology.

## Key Competencies

- High level of discretion and confidentiality.
- Strong analytical and problem-solving skills.
- Clear written and verbal communication abilities.
- Organized, adaptable, and detail-oriented.
- Self-starter who works independently and manages priorities effectively.
- Ability to work under occasional tight deadlines.

## Physical Requirements

- Ability to lift up to 30 lbs.

## Position Information

- **Reports to:** President & Executive Vice President
- **Status:** Full-Time Exempt
- **Schedule:** Majority of working hours to take place between 9AM-6PM Eastern, Monday-Friday
- **Location:** Remote
- **Travel:** Up to five trips annually for staff retreats, events, or in-person team meetings

## How to Apply

Send cover letter, salary requirements, and resume to [hello@sais.org](mailto:hello@sais.org).

## About SAIS

SAIS is a 501(c)(3) organization representing over 395 member schools and the 240,000+ students they serve. The mission is to strengthen member schools by providing high-quality accreditation processes, comprehensive professional growth opportunities, and visionary leadership development programs.

The SAIS staff currently consists of 13 employees who work remotely from home offices. SAIS prides itself on a culture of support and responsiveness to its member schools. Successful team members provide superior customer service, understand the demands on educators and administrators, and have a passion for supporting schools as they grow and evolve in ways that are consistent with their missions.

Please visit [www.sais.org](http://www.sais.org) to review information about membership, accreditation, events, surveys, job postings, listservs, and other member services and benefits.

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