

# CHIEF FINANCE AND OPERATIONS OFFICER SEARCH

**ALTA VISTA SCHOOL**  
San Francisco, California  
altavistaschool.org

Start Date: July 2024



**Carney  
Sandoe**  
& ASSOCIATES

CARNEYSANDOE.COM

# Mission Statement

To prepare students to thrive as creative thinkers, innovators, and catalysts for positive change in the world.

## Vision

Alta Vista School aims to help children grow dynamically, by providing them with a vigorous, interactive educational experience that engages their imagination and nourishes their curiosity, while teaching them how to think effectively and solve problems. With an emphasis on science, math, engineering, the arts, and social emotional learning, Alta Vista School encourages students to go beyond a strong academic foundation to pursue their passions as well as engage their community and environment.

## At a Glance



Established  
2010



Enrollment  
325



Total faculty  
74



Average homeroom size  
14



Students of color  
51%



Financial aid awarded  
\$1.3M



Faculty with advanced degrees  
37

Zip codes represented: 30

Faculty of color: 35%

Student/teacher ratio: 7:1 (Junior Kindergarten); 9:1 (K–5th)

Students receiving aid: 60 (19%)

Annual operating budget \$12.5M

STEAM-based curriculum: 100%

Device/student ratio: 1:1 beginning in 2nd grade

Campus size: 37,000 sq ft (23,000 sq ft at the Lower School and 14,000 sq ft at the Middle School)



## Overview

Founded in 2010 in San Francisco as an inquiry-based STEAM program, Alta Vista School enrolls over 300 students in two locations. The Portola location houses Junior Kindergarten-Grade 5, while the Mission campus welcomes students in Grades 6-8. The Alta Vista community honors its steadfast commitment to preparing students to thrive as creative thinkers, innovators, and catalysts for positive change in the world.

Since its founding, Alta Vista has quickly built an enviable reputation in the Bay Area education world and the school has recently received a seven-year accreditation from the California Association of Independent Schools (CAIS). This summer marks an exciting new chapter for the school as Head of School Sean Hamer concludes a successful five-year tenure and the community welcomes [Rob Cousins](#) as Alta Vista's new Head of School. The school possesses a warm and deeply engaged parent and professional community.

Alta Vista seeks a qualified, energetic, and mission-aligned professional to serve as the school's Chief Finance and Operations Officer (CFOO), responsible for all aspects of planning, organizing, and directing Alta Vista's financial operations. The CFOO will work closely with the Head of School and Board of Trustees on all financial matters and is an integral member of the School's Senior Leadership Team. The next CFOO will be joining the school at a pivotal point in its development as the business office moves from a startup mentality to a mature department with digitized and efficient systems. The school will also face several important strategic decisions as it raises money and engages in building projects to move from its current two campus footprint to one modern campus.



## Opportunities and Challenges

Building on the solid foundation created by the founding administrators and Trustees, the Chief Finance and Operations Officer at Alta Vista will be charged with overseeing all aspects of the school's financial operations. The CFOO will report directly to the new Head of School, Rob Cousins, while also partnering closely with the school's senior administrative team and Board of Trustees. The CFOO is responsible for overseeing the annual budgeting process, revenue collection, and expense management. In partnership with Trustees, the CFOO will conduct financial modeling to ensure the school's financial future and identify opportunities to advance Alta Vista's mission via sound financial planning. This position will be tasked with transitioning this 14-year-old, well-established, and financially sound school to its next phase of development by providing active and visible strategic leadership.

Alta Vista has developed two unique campuses that are several miles apart. As one of the properties is owned and the other is leased, the school has affirmed the goal to find a future permanent, unified home. The school has a strong financial position and is engaged in a capital campaign to expand the range of potential opportunities. While early in the campaign, Alta Vista has quickly gathered significant pledges to support this transformational initiative. Bolstering the school's financial status through the creation of an endowment will be a priority as the school continues to mature.

The school employs full-time employees and contractors to support accounting, facilities, technology, HR, and legal. The next CFOO will be tasked with assessing the current financial and operations staffing and empowered to make the necessary changes to ensure that Alta Vista has the correct personnel structure to meet its ambitious goals.

As the school continues to develop and mature, the next CFOO will be charged with building out a web of systems all working in concert to provide the school community an efficient, transparent, and digital user experience for all interactions with the school. The CFOO will also assess the current budgeting process and work with the administrative team to ensure it aligns with the school's long-term programmatic and strategic goals.



## Responsibilities

The CFOO will be responsible for embracing Alta Vista School's mission, supporting its Head of School and leadership team, and representing the school at professional and public forums. The primary responsibilities for the new CFOO include, but are not limited to, the following:

- Provide strategic leadership, analysis, and management of finances and operations.
- Establish financial and capital strategies that are consistent with the strategic priorities.
- Serve on the Head of School's Administrative Team and lead, co-lead, or participate in several other teams and committees.
- Oversee all business office functions including HR, Facilities, and Finance.
- Spearhead all financial reporting to the Head of School, Board of Trustees, and various committees.
- Clearly and effectively communicate financial objectives and outcomes.
- Conduct financial analyses to better inform decision making (e.g., ROI, KPI, etc.)
- Partner with the Business Manager on general financial operations.
- Serve as chief staff liaison to Board committees.
- Build and/or maintain the school's short- and long-term strategic financial models.
- Implement processes and controls.
- Oversee School operations including personnel, maintenance, and vendors.
- Maintain strong relationships with banks and lenders to ensure that funding is secured for the needs of the school and compliance with loan terms.
- Administer and manage all employee benefit programs including health insurance, retirement, worker's compensation, life insurance, and other related plans.
- Manage insurance programs including property, casualty, medical, workers' compensation.
- Ensure compliance with all local and state reporting requirements.
- Collaborate effectively with Advancement, Admissions, and other administrative departments.
- Participate in diversity, equity, inclusion, and belonging (DEIB) professional development.
- Coordinate closely with the Facilities Director on oversight of the physical plant, grounds, and construction functions.
- Engage fully in the life of the school.



## Qualifications and Personal Attributes

- Strong financial acumen with experience in annual budgeting, and financial forecasting and planning.
- A compassionate leader with high emotional intelligence.
- A creative and strategic thinker who identifies, pursues, and implements growth opportunities on behalf of the institution.
- Desire to build a team and professionalize the finance function.
- Comfort with databases. Veracross experience is ideal but not required.
- A commitment to building community and living Alta Vista's mission.
- Capacity and willingness to collaborate thoughtfully and the ability to build trust with colleagues, creating open dialogues and team-building morale.
- Sophisticated communication skills, both oral and written, and the capacity to tailor messaging based on the needs and interests of the audience.
- The ability to disseminate financial and budgeting information with transparency and clarity.
- A demonstrated commitment to equity and inclusion is vital.
- Appreciation for fast-paced, high energy academic environments.

# Learn More

Click on the links below to learn more about Alta Vista School.

[School Website](#)

[High School Matriculation](#)

[Diversity, Equity, and Inclusion](#)



## To Apply

Interested and qualified candidates are invited to contact the consultants in confidence. Candidates will ultimately need to submit the following materials as separate PDF documents:

- A cover letter expressing their interest in this particular position;
- A current résumé;
- A list of five professional references with name, relationship, phone number, and email address of each.

References will not be contacted without the candidate's permission. Please submit materials to:

**Greg Britton**

Chief Operating Officer, Search and Consulting Group  
ggb@carneysandoe.com

**Sara Shulman**

Practice Leader, Development & Finance  
sara.shulman@carneysandoe.com

*The full-time equivalent salary range for this position is \$175,000-\$250,000. The starting salary is based upon, but not limited to, several factors that include years of experience, education level, and expertise.*