

## Chief Financial and Operations Officer

Branson School  
Ross, CA

Reports to: Head of School  
Schedule: Full-Time; Full-Year Employee  
Exempt Status: Exempt

The Branson School is a coeducational, college-preparatory day school of 320 students, grades 9-12, located in Marin County, California. Branson prides itself on fostering nurturing relationships with students while maintaining high academic standards. The faculty values collaboration, professional development, reflection, and continual exploration of good teaching. Branson teachers work in a beautiful, well-resourced environment with dedicated students. The faculty is widely regarded as outstanding and there exists in the faculty an admirable *esprit de corps* and a positive attitude about their work and their relationship with students.

### ***Position Overview***

Responsible for the overall internal controls and management of the business and financial operations of the school including accounting, tax, budgeting, financial reporting and analysis, financial aid, human resources, procurement, contracts, legal, risk management, facilities and food services. The CFOO is a member of the senior administrative leadership team and serves in an advisory and support capacity to the Head of School, the Finance, Investment, Risk Management and Audit, and Building and Grounds Committees of the Board of Trustees (BOT). Reporting to the CFOO are the Director of Finance, Director of Administrative Technology, Director of Educational Technology, and Director of Facilities.

### **PRIMARY RESPONSIBILITIES**

#### ***Accounting and Financial Management***

- Supervise and support the Director of Finance and other business office staff in financial accounting, reporting, cash management and controls.
- Supervise compilation of financial data to provide audit trails and supporting material in preparation for the annual audit and tax return.
- Lead relationship with the Risk Management and Audit Committee in reviewing and accepting annual financial audit and tax returns.
- Develop and maintain relationships with Banks and other financial institutions, Ensure reporting and adherence to financial covenants and other loan provisions, in the administration of loans.
- Monitor cash in various accounts and invest in accordance with guidance provided by Finance and Investment Committees and based on reserve and investment policies.



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- Review and ensure all disbursements made to vendors, contractors, employees, parents, community partners, and others by the school are supported with appropriate documentation and that approvals are made in accordance with school procedures and BOT corporate resolution(s).
- Keep in touch with parents about general financial information and individual account problems, including past-due accounts.
- Oversee the administration of the School's endowment under the guidance of the Investment and Finance Committees.
- Work with the Director of Finance and Chairs of the Investment and Finance Committees to monitor the endowment's performance.
- Implement investment decisions of the Investment and Finance Committees and coordinate with endowment custodians to ensure adherence to Investment Policy.
- Stay abreast of all federal, state and local tax and bond financing laws as they affect the school to insure compliance with the law.
- Manage relationship with food service provider, *Epicurean*, and support the Director of Food Services in the management and delivery of quality healthy food program for students, faculty and staff.
- Manage relationship with Branson's outside cleaning service.

### **Legal/Contracts/Insurance**

- Engage and work with legal counsel, financial advisors, auditors, brokers, and other professional service firms as needed.
- Review contract terms with key contractors, vendors, service providers, consulting with legal counsel as necessary, and secure changes and approvals as needed.
- Support the Admissions Office in the issuance of enrollment agreements.
- Serve as the Chair of the Financial Aid Committee.
- Support the Director of Human Resources and the Head of School in the issuance of employment agreements.
- Work with school's insurance broker to arrange a suite of appropriate levels for property, liability, umbrella, workers compensation, directors and officers, cyber, fiduciary liability, international travel, and other coverages pertaining to schools.

### **Budgeting**

- Prepare and present the school's annual operating budget in collaboration with the Head of School and Finance Committee, utilizing benchmarks derived from independent school surveys for tuition, salaries and other significant trends.
- Report monthly to the Finance Committee on performance against operating budget and an executive summary of cash, investments, reserves, debt and restricted revenues.
- Prepare or review budgets such as capital improvements, service/educational trips, multi-year technology/facilities budgets in collaboration with the responsible faculty and staff.



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- Work closely with the Finance Committee and the Head of School to enhance, monitor, analyze and update its long range financial model and plan for the school for review and approval by the BOT.

### **Plant/Facilities**

- Supervise and support the Facilities Director in the management of the maintenance, custodial and security for the school campus and other school properties.
- Partner with Director of Facilities to advise and support the Buildings and Grounds Committee in developing, updating, budgeting and the annual fulfillment of deferred maintenance items.
- Oversee and assist in a Master Planning process that will outline a long-term vision for Branson's facilities.
- Assist the Director of Facilities and Buildings and Grounds Committee with the planning, request for proposal (RFP) generation and contract review for major repairs beyond the scope of School's maintenance resources as well as construction of new or renovated facilities.
- Participate as a member of the Emergency Preparedness Team developing and reviewing fire, earthquake and security plans and drills for the school.
- In conjunction with the Athletic Director, manage and maintain relationship with College of Marin as second user of its athletic facilities under a lease agreement, ensuring clear communication and the maintenance of appropriate and safe athletic facilities for Branson's athletic program.
- Ensure that appropriate facilities use contracts and insurance coverage are in place.
- Oversee the management of the school's rental and leasehold property.
- Oversee the management of transportation at Branson; including our formal traffic management plan with the Town of Ross, our fleet of vehicles, and all school-related transportation needs.

### **Required Educational Background and/or Experience**

- Ten to fifteen years of related experience in business or financial and operations administration, of which three to five years should be at the management or executive level with a similar breadth of responsibilities
- Undergraduate degree with a preferred emphasis on finance/accounting. An MBA degree or significant business education at the graduate level is highly desirable.
- Familiarity with not-for-profit management theory and practice, and not-for-profit accounting and reporting standards.
- Demonstrated strategic planning ability as well as effective interpersonal, organizational, analytical, and communication skills.
- Previous experience in an educational environment is preferred, but not essential.
- Working knowledge of IT hardware and software life-cycles and how they impact short-, medium-, and long-term budgets.



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## Necessary Skills and Abilities

- Excellent interpersonal skills, including the ability to inspire, motivate, and direct others in the accomplishment of Branson's Strategic Plan and the school's other long-term goals.
- Familiarity with construction management and facilities management issues and procedures.
- Experience with management information systems, particularly automated accounting systems.
- Working knowledge of human resource management policies and practices.
- Ability to navigate, manage, and resolve conflict
- Excellent communication skills, including listening as well as oral and written expression.
- Deep knowledge, understanding, and appreciation of the different arms of an independent school, including academic, athletic, alumni relations, parent relations, and all other school programs and activities.

To Apply: Please send your resume, cover letter, and names of three references to Greg Britton and Lauren Mayfield: [gbritton@carneysandoe.com](mailto:gbritton@carneysandoe.com), [lauren.mayfield@carneysandoe.com](mailto:lauren.mayfield@carneysandoe.com)

*Branson is an Equal Opportunity Employer and is committed to a policy of equal employment opportunity for all applicants, employees, volunteers and interns, and the School makes decisions based on the merits of each candidate. Branson prohibits discrimination based on an individual's race, color, religion (including all aspects of religious beliefs, observance or practice, including religious dress or grooming practices), sex (including gender, gender identity, gender expression, transgender, pregnancy and breastfeeding), sexual orientation (including heterosexuality, homosexuality, and bisexuality) national origin, ancestry, citizenship status, age, marital status or registered domestic partner status, uniformed service member or veteran status, physical or mental disability, medical condition, genetic characteristics or information, or any other basis protected by law. The School will afford equal employment opportunity to all qualified applicants, employees, volunteers, and interns as to all terms and conditions of employment, including, without limitation, compensation, hiring, training, promotion, transfer, discipline, and termination.*



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