



## Director of Finance and Operations Position Description

Established in 1932, Barrie School cultivates intrinsic motivation in students through a progressive and collaborative approach to education and was one of the first integrated schools in the great Washington D.C. region. The school currently serves 285 students in two divisions: Lower School (12-months to 5th grade) and Middle and Upper School (6th to 12th grade). The School is also the home to the Institute for Advanced Montessori Studies, a nationally recognized training institute for teachers throughout the region, and Barrie Camp, a day program that serves more than 500 families each summer. This is an excited time to join the Barrie School community as enrollment and retention are up significantly, we are expanding the number of classes due to parent demand, and we are instituting wait lists in a number of grades.

Barrie School seeks an experienced business management professional to assume the role of Director of Finance & Operations (DFO). The DFO oversees and provides strategic guidance on the school's \$11 million annual budget, and ensures that accounting and finance systems accurately reflect the budgeted results and financial position of the school in accordance with GAAP. The position reports directly to the Head of School, is a senior member of the Administrative Team, and works closely with the Finance Committee and Board of Trustees.

Salary and benefits will be commensurate with experience, and will include a generous vacation package. In addition, staff housing adjacent to campus may be available at significantly reduced cost. The role is designed to start on July 1, 2021.

### Core responsibilities of the DFO include the following:

- **Trustee Engagement and Budget Planning:** Communicate regularly with the Finance Chair and Head of School to prepare for meetings with the Finance Committee and the Board of Trustees. Play a key role in the development of the annual operating budget, multi-year forecasts, and other relevant reports.



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- **Strategic Partnership:** Collaborate with the Head of School and Board of Trustees to secure and deploy financial resources to fulfill the school's strategic priorities. Participate in the development of school strategy, providing recommendations, financial analysis, projections, and other data to inform the process.
- **Financial Oversight:** Maintain financial controls, fixed asset ledgers, capital acquisitions, depreciation, and disposals. Oversee the school's endowment and investment portfolio to ensure accurate reporting and donor intent is being met.
- **Business Operations:** Lead the organization and management of the Business Office including accounting, accounts payable, accounts receivable (tuition and fees), cash management, purchasing, budgeting, financial reporting, human resources, payroll, employee relations and benefits, and the 403(b)-plan administration. Oversee legal issues, risk management, insurance, transportation, and the annual revision of the Employee Handbook.
- **Facilities and Safety:** Supervise the Director of Facilities and oversee facilities management, which includes building repairs, construction, security, janitorial, and careful planning to ensure planned multi-year support for all buildings and grounds. In addition, the DFO lead the school's health and safety response team and supervises the School Nurse.
- **Collaboration with Key Departments:** Supervise the IT work done by Jaguar Technologies. Work with Admissions to create student contracts and generate financial reports for enrollment and retention and serve on the Financial Aid Committee to analyze applicant needs and assist in the management of financial aid administration. Work closely with the Director of Development to maintain appropriate records for donations and pledges.
- **Audit and Regulatory Compliance:** Work with the school's independent auditors and prepare the necessary documentation for a successful completion of the audit. File the appropriate of tax returns (990, 5500) and other regulatory filings on time and precision. Ensure that all school, personnel, and operational policies are in compliance with local, state and federal regulations. Oversee the completion of annual surveys, including NAIS, AIMS, AISGW, NBOA, and DASL.



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- **Supporting a Positive School Community:** Model and foster high ethical standards, integrity, and respect for colleagues, alumni, parents, and students in the conduct of the school's business. Understand the culture and climate of the school and the wider educational environment. Manage, mentor, and develop direct reports, providing constructive and timely feedback.
- **Ongoing Professional Engagement:** Remain current with business management trends and cultivate professional standards and development by participating in educational opportunities, reading professional publications, maintaining personal networks, and participating in local, regional, and national professional organizations.
- This may not represent a complete list of responsibilities and other duties may be assigned to support the needs of the School.

#### Essential Skills and Qualifications

- 10 years or more of leadership in accounting, finance, operations or general business management, preferably in an independent school or non-profit organization
- Bachelor's Degree in accounting, finance, business management, or related area of study (CPA and/or advanced degree in finance or accounting preferred)
- Excellent written communication and presentation skills
- Proven track record of organization improvement and change management. Can adapt to a hands-on, detail oriented, fast paced work environment.
- Advanced skillset needed in critical thinking, data analysis, spreadsheet software, and proficiency with accounting and financial systems
- Strong experience with database management systems (like Blackbaud or others. Proven ability to streamline database system efficiencies is a major plus
- Ability to support school wide efforts in diversity, equity, and inclusion
- Broad-based operations and project management experience with strong organizational skills and ability to manage multiple projects



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- An enthusiastic, collaborative working style is essential

Barrie School is one of the most diverse independent schools in the country.

We do not discriminate in hiring or employment on the basis of race, color, religion, sex (*including pregnancy and gender identity*), LGBTQ identity, national origin, political affiliation, marital status, disability, genetic information, age, membership in an employee organization, retaliation, parental status, or other non-merit factor.

### **TO APPLY**

Interested and qualified candidates should submit electronically in one email and as separate documents (preferably PDFs) the following materials:

- A cover letter expressing their interest in this particular position;
- A current résumé;
- A one-page statement of educational or leadership philosophy and practice;
- A list of five professional references with name, phone number, and email address of each (references will not be contacted without the candidate's permission) to:

Gregory Britton  
Managing Associate, Search & Consulting Group Operations;  
CFO/Business Manager Placement  
[gbritton@carneysandoe.com](mailto:gbritton@carneysandoe.com)



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