



Buckley Country Day School
Chief Financial Officer
Position Description

OVERVIEW OF ROLE

The CFO is a member of the senior leadership team and is responsible for managing the financial and physical resources of the school. This position will direct Business Office operations, the Human Resources function, and Facilities and Maintenance, and Safety and Security at the School. The CFO serves as the Head of School's strategic business partner providing fiscal and operational analysis and support. The CFO works closely with the members of the School's administrative team to ensure the School's finance and operations functions support its mission, core values, and strategic plans.

Reports to:

Head of School

Manages:

Business Office Coordinator (AP, payroll, employee benefits, maintenance supervision),
Business Office Associate (AR, general ledger), Maintenance Staff (Indirect), Security Officer, Food Service, Cleaning Service.

OPERATIONAL ACTIVITIES OF THIS POSITION

Finance

- Develop budget, forecasts, and long-term financial plans.
- Manage the P&L and report on actuals; monitor use of resources, identifying opportunities for efficiency and savings.
- Serve as liaison to Board of Trustees for fiscal and facilities matters. Present budgets, forecasts, and financial results to Board.
- Execute endowment investment strategy in consultation with the Investment committee
- Perform financial analyses to support strategic decisions making
- Partners with Director of Admissions and Financial Aid to award annual financial aid grants.
- Risk management: safeguard assets and minimize institutional risks and costs. Work closely with Head and Trustees to ensure School is appropriately insured.
- Work with outside legal counsel to assess and authorize contracts for School
- Serve as fiduciary for School's retirement plan
- Direct business office
 - School business functions include, but are not limited to, tuition billing and collection, accounts payable, contracting, accounting and reporting, regulatory reporting and compliance, and other business administration activities.
 - Support Head in annual employee agreement process; create and manage agreements
 - Administer payroll

- Work closely with auditors to prepare for audit process and annual tax return
- Prepare and submit state and local compliance requirements
- Cultivate a service-oriented approach to all Business Office interactions.
- Remain current with accounting and business management trends and cultivate professional development by participating in educational opportunities, reading professional publications, maintain personal networks, and participating in local, regional and national professional organizations.

Human Resources

- Support Head of School in strategic development of employee benefits package to attract and retain employees while managing expense.
- Ensure that human resources policies and practices are clearly articulated, consistently applied, and conform to legal requirements.
- Oversee all aspects of benefit administration, including but not limited to: medical, dental, group life, short term and long term disability insurance policies, worker's compensation, and the retirement and flexible spending plans.
- Assists administrators with faculty and administrative hiring including: the posting of positions, background and reference checks.
- Coordinate the administrative part of the onboarding process for new faculty and staff.
- Serve as a resource for employee grievances; resolve issues as they arise
- Leverage outside counsel for legal issues.

Facilities, Maintenance and Security

- Establish policies and protocols that meet all required environment, health, and maintenance standards as required by law and work with the administration to ensure compliance with all regional, state, and federal regulations and laws as they impact the school.
- Direct Facilities team, overseeing the maintenance of the building, grounds and equipment to ensure that the School facilities are safe, and that the School's appearance is in exemplary condition.
- Ensure facility readiness for day-to-day events as well as special events; Manage faculty and staff facilities requests through work order system
- Plan, schedule and assign work for the maintenance staff to ensure proper distribution of assignments, conformance with established standards of care, and adequate personnel and equipment for performance of duties. Ensure accountability on assigned work for follow up and completion.
- Continually assess, audit and evaluate the physical condition and performance of school buildings and systems. Troubleshoot, develop and direct prioritized corrective actions as required.
- Foster positive relationships with internal faculty and staff, and external constituents including civic officials, neighboring community members, and external vendors.
- Negotiate and manage vendor contracts and relationships; arrange bids and develop specifications for all outside contractual work.
- Oversee campus construction plans; manage CAPEX budget
- Research and maintain up-to-date knowledge base of "Best Practices" within the Facilities Management Industry.

- Oversee safety and security professionals and ensure that school is in compliance with all state and local ordinances. Continually assess security equipment, processes, and procedures for potential improvements.

Leadership

- Lead with empathy and professionalism utilizing the School's mission and vision as a guide and keeping the experience of all community members at the forefront of all decisions.
- Lead with an understanding of the culture and climate of the school and the wider educational environment
- Manage, mentor and develop direct reports, providing constructive and timely feedback.
- Model and foster high ethical standards, integrity, and respect for colleagues, alumni/ae, parents, and students in the conduct of the school's business.
- Serve as a strategic business partner to all members of the leadership team, providing positive and proactive solutions to business issues.

QUANTITATIVE SCOPE

\$10M Operating Budget

\$8M Endowment

30 Acres

3 Buildings

QUALIFICATIONS

Technical

- Bachelor's degree in Accounting; CPA and MBA preferred
- 7-10 years financial management experience at a senior level
- Experience preparing and presenting complex financial analyses in a concise manner to senior management/board committees
- Proven track record of developing and executing cross-functional operational plans
- Knowledge and experience in setting up effective financial controls and proven financial modeling and forecasting skills.
- Experience analyzing data and utilizing key operating metrics to guide decision making
- Experience managing, motivating, and developing staff

Leadership

- Willingness to fully engage in a Toddler through 8th grade independent school.
- Professional, optimistic, and collaborative management style
- Ability and willingness to act decisively. Highly organized and able to support a team in a fast-paced environment.
- Excellent communication and presentation skills, both verbal and written.
- Strong relationship builder. Ability to interact with administration, faculty, staff, students, families, and the Board of Trustees.
- Ability to serve as a strategic business partner, capable of providing positive and proactive solutions to business issues.

