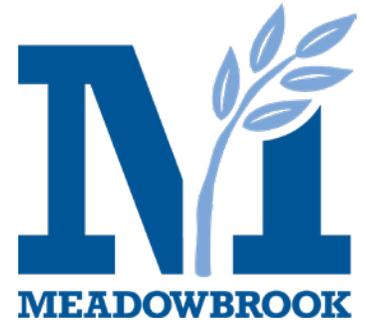


# DIRECTOR OF FINANCE AND OPERATIONS SEARCH

## THE MEADOWBROOK SCHOOL

Weston, Massachusetts  
meadowbrook-ma.org

Start Date: July 2024



**Carney  
Sandoe**  
& ASSOCIATES

CARNEYSANDOE.COM



## Mission Statement

At Meadowbrook, our mission guides us every day, in all that we do.

We know, love, and challenge every child.

Together, as a diverse community with high academic, ethical and social standards, we nurture character, promote confidence, inspire creativity, and foster critical thinking skills as we guide each child's journey in the pursuit of excellence.

## Statement of Diversity & Inclusion

We believe a diverse and inclusive community is central to Meadowbrook's mission.

We embrace our students, faculty, and families in all their diversity, which we broadly define as race, gender, age, ability/disability, ethnicity, culture, religion, nationality, family structure, sexual orientation, gender identity and expression, and socioeconomic class, among other characteristics that contribute to each person's full identity.

We cherish and respect individual stories, strengths, weaknesses, voices, and backgrounds. We examine and question our methods and narratives in order to grow individually and as a community. This is an ongoing, dynamic journey that we take together. We believe that only through such a community can we know, love, and challenge each child.

## Vision Statement

The Meadowbrook School is committed to providing an exemplary, inspirational K-8 educational experience.



## At a Glance



Established  
1923



Enrollment  
315



Financial aid awarded  
\$1.65M



Student-faculty ratio  
7:1



Students of color  
50%



Total faculty and staff  
91



Faculty with advanced degrees  
68%



Campus size  
36 acres

Cities and towns represented: 35

Faculty of color: 17%

Students receiving aid: 14%

Endowment: \$26M

Annual operating budget: \$19.5M

Interscholastic sports teams: 15



## Overview

The Meadowbrook School of Weston is a co-educational day school founded in 1923, serving 315 Pre-K through Grade 8 students on a breathtaking 36-acre campus with 6 state-of-the-art buildings in eastern Massachusetts. Meadowbrook prides itself on being a diverse and inclusive community with high academic, ethical and social standards, nurturing character, confidence, and creativity for every child. The community-wide dedication to excellence, engagement, and mission and goal alignment at this school is unparalleled. Meadowbrook's website <https://www.meadowbrook-ma.org> describes its commitment to providing countless opportunities for personal exploration and challenge, graduating their students with a strong sense of self and leadership capacity.

Meadowbrook now seeks a seasoned, thoughtful, and dedicated professional to serve as the school's next Director of Finance and Operations (DFO). Reporting to Head of School Arvind Grover, this individual leads all aspects of finance and operations, acts as strategic thought partner for the Head of School and Board of Trustees, and enjoys many opportunities for collaboration, team building, innovative thinking, project management, staff advocacy and development, and input to help shape the future of the school. The School's financial position is strong, and its impressive campus provides tremendous support and growth potential to advance the School's mission via thoughtful management and sustainable planning. Meadowbrook aims to hire a goal-oriented leader who respects and embraces the school's inclusive values and universal commitment to excellence. A successful DFO will build upon the school's strong financial foundation to develop and execute strategic goals to advance the school's mission via thoughtful management, analysis, assessment, and innovation.



## Opportunities and Challenges

Meadowbrook's next DFO will have the opportunity to join a diverse, engaged, warm and inclusive community, strongly aligned to delivery of the school's mission and achievement of its goals and aspirations. Ideal candidates will have strong financial and operations management skills, well-honed leadership expertise, and a dedication to collaboration and team building. The DFO will work closely with the Head of School as a trusted strategic partner and will be welcomed by a highly collaborative Senior Leadership Team. Responsible for overseeing the annual budgeting process and all financial operations of the school, this individual will work closely with all budget holders throughout the school and will also partner with leadership and a highly functioning Board of Trustees to create and maintain both short and long range strategic financial planning and consolidated reporting. Serving as the school's liaison, the DFO will provide regular financial monitoring, budget updates and projections, and performance reports to the Board's Finance and Facilities Committees. The DFO will also oversee the administration of the school's endowment, executing its investment policy, implementing decisions of the Endowment Committee, coordinating with endowment consultants, investment managers, and custodians, and ensuring effective endowment allocations and performance management. The new DFO will enjoy opportunities to help steward endowment growth with refined data integration, tracking, and reporting processes. Additionally, they will provide regular financial and relevant data to the Board's Compensation & Benefits and Auxiliary Programs Committees. The next DFO will have the opportunity to be an integral part of a joyful, high-achieving, and high-functioning school community committed to teamwork, continual improvement, and all-around excellence. Prudent financial management, long range financial planning, efficiency of business operations, optimization of financial processes, procedures and reporting, review of current financial software and data integration, and careful stewardship of and strategic planning for its impressive facilities will be important foci for the new DFO.



## Responsibilities

In addition to embracing Meadowbrook's mission, supporting its Head and leadership, and representing the school at professional and public forums, the new DFO has a number of primary responsibilities:

- 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 Leadership Team and lead, co-lead, or participate in several other teams and committees.
- Oversee all business office functions including all financial reporting to the Head of School, Board of Trustees, and various committees.
- Serve as chief staff liaison to Board committees.
- Build and/or maintain the school's short- and long-term strategic financial models.
- Oversee the administration of the school's endowment.
- 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 in close coordination with the Head of People.
- Manage insurance programs including property, casualty, medical, workers' compensation.
- Ensure compliance with all local and state reporting requirements.
- Collaborate effectively with Advancement, Enrollment, People Operations, Technology, Auxiliary Programs, and other departments.
- Participate in diversity, equity, inclusion, and belonging professional development.
- Coordinate closely with the Facilities Director on oversight of the physical plant, grounds, and construction functions.



## Qualifications and Personal Attributes

- Bachelor's degree required, MBA or CPA preferred;
- 10-15 years of senior-level experience creating and executing financial planning and management strategies;
- Experience in an independent school preferred, though individuals with strong financial and leadership skills are welcome;
- Experience managing a team, setting clear goals, responsibilities, expectations, and clear methods of accountability; successfully creating cohesion among the team;
- Experience managing a team with both in-office and remote members, successfully creating cohesion among the team itself;
- Proven record of accomplishment designing, implementing, and managing large-scale organizational change;
- Superb communication skills; excellent written, verbal, and presentation skills;
- Commitment to collaboration;
- Demonstrated ability to understand complex subjects, distill them, and then communicate them to varied audiences;
- Experience on senior administrative teams and working with non-profit Boards;
- Demonstrated experience in measuring and improving organization-wide productivity;
- Demonstrated experience in the development of analysis for strategic decision-making, such as key cost drivers, competitive analysis, market analysis, organizational strengths, and weaknesses, etc.;
- Experience in employee benefits (including pension plans), and payroll procedures. Knowledge of business and not-for-profit accounting policies, procedures, practices, facilities, and software programs;
- Ability to think and plan strategically and creatively;
- Ability to supervise, manage, and delegate multiple functions and activities;
- Ability to remain calm, flexible, and work effectively under pressure;
- Skilled at negotiating and initiating contracts with external vendors;
- Aptitude for high customer-service standards;
- Consistent demonstration of an entrepreneurial mindset;
- Demonstrated commitment to equitable and inclusive practices;
- A track record of strong integrity.

# Learn More

Click on the links below to learn more about Meadowbrook.

[School Website](#)

[High School Matriculation](#)

[Equity and Inclusion](#)

[About Weston, Massachusetts](#)

[Virtual Campus Tours](#)



## 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) to:

### **Elyse Waterhouse**

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### **Scott Nelson**

Consultant

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