

CHIEF FINANCIAL OFFICER

*Wayland Academy
Beaver Dam, WI*

The Chief Financial Officer (CFO) role is designed to address the financial and operational needs of Wayland. The CFO reports directly to the Head of School and is a key member and strategic partner to the school's leadership team and Board of Trustees and is responsible for the overall strategy and execution of the financial and operational aspects of the school. The CFO is responsible for the strategic and tactical management of the Academy's financial areas, including but not limited to, Finance and Accounting, Facilities and Operations, Facilities, contract employees (Sodexo Food and Facilities, Health Center, and Inter Quest), and Human Resources.

The CFO is responsible for ensuring the long-term fiscal health and viability of the school, including planning, implementing, managing and oversight of the financial and operational activities. The CFO is a key thought leader on organizational matters; overseeing and directing policies and procedures relative to school's operations; and leading efforts for process improvements and performance enhancements. The CFO also serves as chief financial spokesperson for the Academy and develops strong professional working relationships with the Board of Trustees. The CFO will serve as a member of the senior administrative team and staff (as well as be actively involved with) various board committees, including but not limited to the Finance Committee.

Duties and Responsibilities

Finance and Human Resources:

- Implement strategies to achieve the financial goals of the strategic plan
- Responsible for all areas of the accounting function, including developing and overseeing appropriate financial procedures and controls
- Responsible for development of and monitoring annual operating budget, maintenance project budget, and capital project budget
- Responsible for the annual audit
- Responsible for the preparation and presentation of monthly financial statements and analysis of accounts
- Evaluate, purchase and oversee property, liability, D & O and workers' compensation, and other insurance programs
- Review vendor contracts (i.e. telephones, copier, phone services, maintenance, food, etc.),
- Responsible for all financial matters including but not limited to students' tuition accounts, accounts receivable, accounts payable, cash management, reporting (both internal and external)
- Acts as the purchasing agent for the Academy
- Manages the human resources function of Wayland Academy



**Carney
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& ASSOCIATES

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- Evaluate and supervise employee benefit programs
- Formulate and revise employment policies
- Coordinates wage and benefits policies and practices with the Head of School
- Acts as a key administrator in resolving problems of a personnel nature

Auxiliary Services:

- Responsible for increasing opportunities for additional revenue sources
- Responsible for summer programs and External Events Coordinator
- Responsible for the operations of the school store

Facilities:

- Review and negotiate the contract of the independent facilities service contractor,
- Supervises the Director of Facilities
- Oversees the maintenance and repair of the physical plant, grounds, machinery and vehicles of the Academy
- Responsible for the preparation and monitoring of the short-term maintenance plan
- Responsible for the preparation and monitoring of the long-term maintenance plan

Food Service:

- Review and negotiate the contract of the independent food service contractor
- Supervises the independent Director of Food Services
- Responsible as the primary contact for major activities' meal offerings

Board and Other:

- Acts as the in-house legal coordinator of any and all legal documents such as student and faculty contracts and all other contracts
- Serves as liaison to the Finance Committee of the Board of Trustees (with the Head of School)
- Has the authority to commit the school to financial transactions
- Prepare monthly agenda and related information for Finance Committee Meetings and ad hoc committees of the Finance Committee
- Participates in committees as assigned by the Head of School
- Attends Academy social functions as directed by the Head of School
- Performs other related duties as required by the Head of School
- Makes recommendations to the Head of School concerning policies and procedures

Leadership skill qualifications:

- honesty
- strategic thinking
- competence
- teamwork
- encouragement
- compassionate



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- enthusiasm
- reliability and follow-through
- strong written and oral communication
- open and collaborative management style

Education and/or Experience:

- Minimum of bachelor's degree in business administration or related field,
- MBA or related advanced degree preferred
- 5+ years of experience in a CFO, Controller, or Assistant CFO/Controller/ Business Manager role
- Strong background in finance, budgeting, investing, and cash management,
- Previous supervisory experience
- Experience with non-profits or schools a plus
- Outstanding communication skills. Ability to communicate with constituents and the Board of Trustees
- Advanced technology skills including Word, Outlook, Excel and database management software
- Blackbaud software experience is a plus

The above statements reflect the general details necessary to describe the principle functions of the occupation described and shall not be construed as a detailed description of all the work requirements that may be inherent in the occupation.



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