

CHIEF FINANCE AND OPERATIONS OFFICER SEARCH

SAN FRANCISCO FRIENDS SCHOOL

San Francisco, California
sffriendsschool.org

Start Date: July 2024

san francisco
**FRIENDS
SCHOOL**



**Carney
Sandoe**
& ASSOCIATES

CARNEYSANDOE.COM

Mission Statement

At San Francisco Friends School, students learn in a community grounded in the Quaker values of reflection, integrity, peaceful problem-solving, and stewardship.

Our teachers challenge students with a dynamic curriculum that inspires curiosity, cooperation, and hard work. We teach children to listen to all voices and to trust their own.

We engage with the world around us with kindness and conviction, working toward the Quaker ideal of a caring and just society.

At a Glance



Established
2002



Total Enrollment
435



Total Faculty and staff
89



Student-teacher ratio
10:1



Students of color
57%



Financial aid awarded
\$3.9M



Faculty with advanced degrees
29%

Zip codes represented: 34
Faculty of color: 38%
Students receiving aid: 26%

Endowment: \$7.5M
Annual operating budget: \$18.7M



Overview

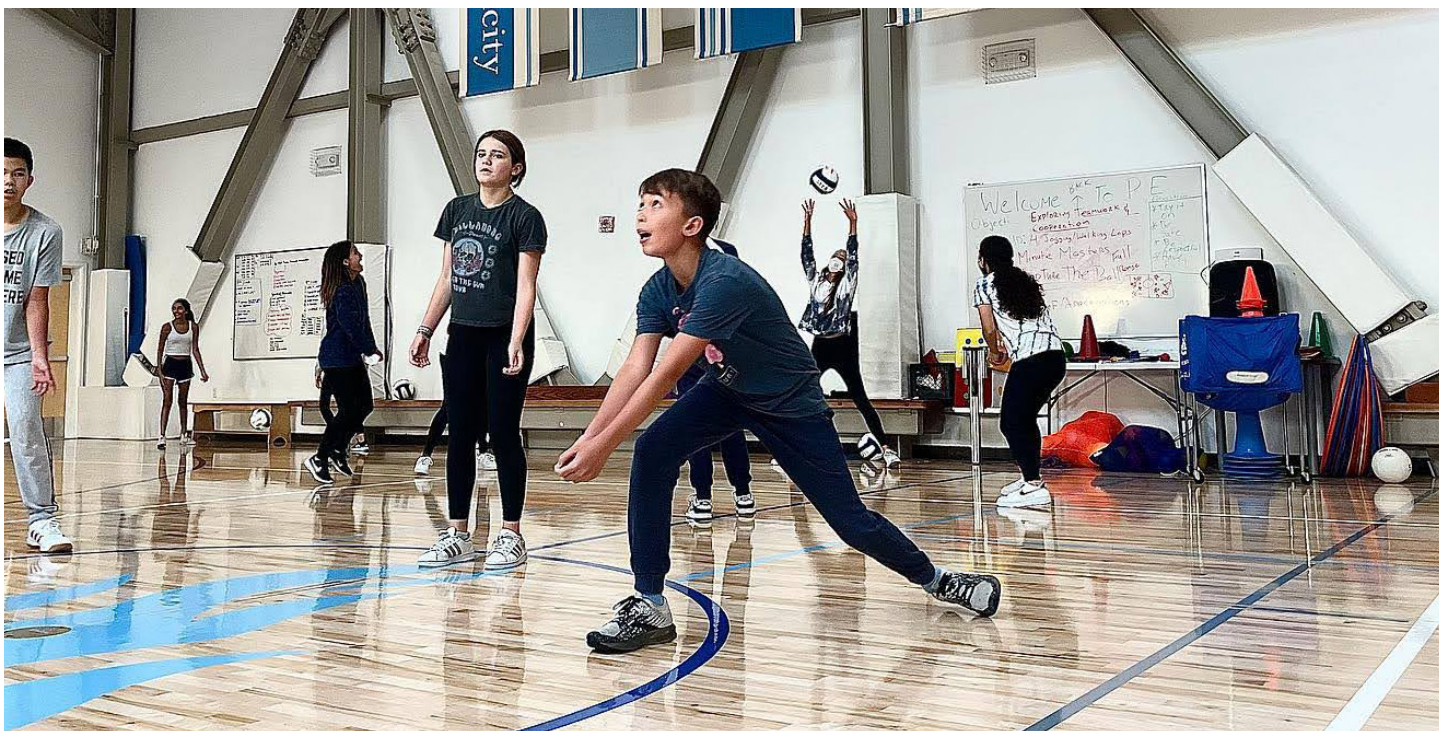
San Francisco Friends School (SFFS) educates children in Kindergarten through Grade 8 in the tradition of Quaker learning. Both a young school, in the middle of its second decade, and old, part of a 325-year tradition of Friends education, SFFS nurtures students' aspirations and excellence in academics and character. As one of two Quaker schools west of the Mississippi, San Francisco Friends School is distinctive amongst independent schools in the Bay Area and Friends schools nationally.

At SFFS, teachers, coaches, and advisors design and facilitate hands-on and minds-on student experiences in math, science, and sports; in the arts, humanities, and Spanish; and in reflection and service. The Quaker traditions, woven in with a progressive pedagogical approach create a program that is intellectually rigorous and engaging, while helping students to develop a strong sense of self and community. Along the way, faculty and staff seize every opportunity to learn in and from San Francisco and the community within the Mission District while embracing the school's responsibility to contribute.

SFFS was founded in 2001; in 2008, SFFS moved into its current campus at 250 Valencia St. with two floors of classrooms, a Meeting Room, and a library. In 2013, construction of the third floor of this main building was completed, resulting in the creation of beautiful new art studios, music rooms, a black box theater, the Middle School Learning Commons, and a full-size gym. SFFS launched their partnership with Horizons in 2014 and the program has grown to serve 150 K-8 public school students who return each summer for joyful academic and enrichment experiences on the School's campus.

Enjoying robust growth and evolution over its 21 years and a strong current financial position, the School is now poised on the next phase of campus expansion and program enrichment. In 2022, Head of School Pankti Sevak joined the SFFS community, possessing new, dynamic energy along with meaningful experience in Quaker education and will lead this strategic planning and implementation.

Now, SFFS seeks an experienced, dedicated, and talented professional to serve as Chief Financial and Operations Officer (CFOO). Reporting directly to the Head of School, this individual will enjoy many opportunities for engagement in strategic planning and partnership, project management, staff development, broad collaboration, and community involvement. The CFOO, overseeing all aspects of finance and operations, will lead talented and highly functioning teams in the Business Office, Human Resources, Facilities, Student Health, and IT Departments.



Opportunities and Challenges

The CFOO at SFFS will succeed a leader who has been highly visible, integrally involved in community life, and closely aligned with the School's mission and values. The new CFOO will enjoy success following these traditions as they join warm, welcoming, and collaborative colleagues. SFFS's next CFOO will work closely with the Head of School, senior leadership team, and Board of Trustees as a trusted strategic and critical business thought partner to ensure financial sustainability, assess and enhance risk management policies and protocols, oversee campus expansion, and support Human Resources to crystallize related practices and procedures. The CFOO will match skilled financial management with equal attention and expertise to the oversight of operations including Facilities, IT, Food Service, and Campus Safety. Strategic analysis of resources, exploration of alternative revenue sources, and sophisticated but digestible long range financial modeling will be required.

Several years ago, SFFS acquired adjacent property to the campus and plans are underway to develop and expand the school's footprint. The CFOO will partner with the Head of School, academic leadership, the Development team, the Board of Trustees, and engaged contractors and vendors to ensure sound financial planning, including exploration of debt financing, successful coordination of a related capital campaign, and the creation of a construction timeline and plan that minimizes disruption for the community.

Guiding the crystallization of policies and procedures and optimization of systems and practices related to Human Resources will be an important focus of the new CFOO. Additionally, working with Horizons to update partnership structure, upgrade systems, and bring efficiencies to the related financial operations is a near term opportunity for this position.

The CFOO will demonstrate leadership through seasoned expertise, innovative thinking, effective communication, good listening skills, community involvement, and an understanding of and respect for Quaker values and process.



Essential Duties and Responsibilities

- Develop, implement, and oversee plans and programs related to accounting, finance, investment, audit, compliance, financial aid, risk management, and purchasing.
- Prepare, present, and interpret operating budget and financial reports for the Head of School, the Finance Committee, and the Board of Trustees.
- Ensure that the school follows all appropriate FASB and GAAP accounting standards and complies with all relevant state and federal tax reporting requirements.
- Oversee risk management programs through evaluation of insurance needs and coverages, review of insurance proposals and selection of appropriately rated carriers.
- Invest endowment funds and operating cash reserves in accordance with resolutions adopted by the Board of Trustees and monitor and report investment performance to the Finance Committee and Board of Trustees.
- Direct and manage the Business Office, IT Department, Facilities(outsourced), Front Desk Operations, Nurse/health, Custodial (outsourced), campus food service (outsourced), and campus security (outsourced). Work with vendors and management companies, select employees, set performance standards, delegate responsibilities through clear directions, and monitor performance.
- Participate in long-range financial planning, strategic planning, facilities planning, capital project planning and implementation, and annual facilities maintenance planning and implementation. Oversee, directly or indirectly, all construction projects.
- Advise the Head of School in all matters of employee relations, including guidelines on hiring, benefits, compensation, preparation of salary scales, retirement plans, and compliance with all relevant state and federal employment rules and regulations.
- Review financial aid applications and make recommendations on financial aid award amounts. Serve on the Financial Aid Committee and, with others, make final determinations of financial aid awards. Implement the financial aid program through the student billing function.
- Engage and work with legal counsel, financial advisors, auditors, and other professional service firms as necessary and appropriate.
- Prepare and/or review the preparation of statistical and survey reports for NAIS, CAIS, ISBOA (Independent School Business Officers Asso.) and other organizations as may from time to time be appropriate.



- Partner with the Technology Office to budget for strategic IT initiatives, as well as the prudent and timely replacement of existing IT infrastructure.
- Coordinate closely with the Technology Office on physical plant or other projects that have a technology component or impact.
- Interface with Horizons - support their finance and operations as a fiscally sponsored entity, provide guidance on Human Resources, Operations, risk management, etc.
- Oversee rental agreements, use of facilities by other non-profits in support of mission.
- Work with Director of Extended Day to set pricing, hiring, wages, and logistics elements of ED, A3, enrichment, and music programs.
- Participate as community member in duties to support community.
- Engage in professional networks for continued professional growth.

Qualifications and Personal Attributes

Required Educational Background and/or Experience

- Undergraduate degree with a preferred emphasis on finance and/or accounting. An MBA degree or significant business education at the graduate level is highly desirable.
- Ten to fifteen years of related experience in business or financial administration, of which three to five years should be at the management or executive level with a similar breadth of responsibilities.
- 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.



Necessary Skills and Abilities

- Ability to inspire, motivate, and direct others in the accomplishment of their objectives.
- 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.
- Excellent communication skills, including listening as well as oral and written expression.

Critical Behavioral Competencies

- Flexibility/Adaptability: Demonstrated flexibility to change as circumstances require and adaptability in attitudes and behaviors to work effectively with different people and situations.
- Interpersonal Skills: Excellent interpersonal skills including the ability to objectively assess and respond to difficult workplace situations; an awareness of one's own style and how it affects others; the ability to appropriately adjust one's own behavior being attentive, understanding, and respectful of others' points of view; effectively responding to and resolving interpersonal problems in the workplace and developing positive work relationships with others.
- Planning and Organization: The ability to analyze problems, think creatively, synthesize solutions, and establish priorities that address the details and timeliness needed to achieve the intended results, effectively utilize available resources, and complete work and/or projects on time and according to plan.
- Making Effective Decisions: Gather information on issues impartially considering all sides, and make logical, clear decisions that are within time and resource constraints.
- Taking Responsibility: Follow through on commitments, only making promises that can be kept, and accepting responsibility for actions, results, and mistakes.
- Positive Attitude: Promote a "can do" atmosphere, maintain enthusiasm despite criticism, support the school's mission/objectives, and work with others in a pleasant, happy, and upbeat manner.

Other Requirements

This job requires to ability to:

- Stand, walk, climb stairs (or use an elevator), and/or sit indoors most of the time as well as outside some of the time.
- Use hands and fingers in a manner that requires manual dexterity to get the job done. Often requires the use of hands and arms to reach for objects.
- Communicate to others orally (ability to speak and hear) and in writing.
- Occasionally, lift weight or exert force up to 40 pounds.
- Work the hours required to carry out this job's responsibilities.
- Occasionally drive from one location to another in the local area.

Work Environment

- The environmental conditions typical to an academic setting with offices and classrooms located in multiple locations within the same general proximate area.
- Occasionally subjected to extremes of noise and temperature.

Learn More

Click on the links below to learn more about San Francisco Friends School.

[School Website](#)

[Strategic Direction](#)

[Equity, Inclusion, and Belonging](#)

[Quaker Values and Community](#)

[High School Matriculation](#)

[About San Francisco, California](#)

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); and
- Responses to writing prompts that will be shared with candidates upon expression of interest.

Sara Shulman

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Elyse Waterhouse

Consultant

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The full-time equivalent salary range for this position is \$250,000 - \$300,000. The starting salary is based upon, but not limited to, several factors that include type and years of experience, education level, and expertise.