



**THE LAB SCHOOL OF WASHINGTON**  
Washington, DC

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**CHIEF FINANCE & OPERATIONS  
OFFICER**

Start Date: July 2022

[labschool.org](http://labschool.org)



**Carney  
Sandoe**  
& ASSOCIATES



## Mission

*The Lab School of Washington is an innovative learning community fostering scholarship and creativity in students with language-based learning differences. In an environment of inquiry and hands-on exploration, Lab School students learn to advocate for themselves as they become engaged and compassionate members of a global society.*

## OVERVIEW

The Lab School of Washington is an innovative, independent 1st – 12th grade learning community, fostering creativity and critical thinking for students with language-based learning differences. At Lab, students tackle learning challenges head on in a supportive environment that inspires them to take risks and is designed for them to thrive. Students gain self-confidence in their learning abilities and develop strong habits of mind, cultivating the necessary skills to embrace the world as life-long learners.

The Lab School of Washington is seeking a seasoned professional to become Chief Finance & Operations Officer (CFOO), assuming the role in July 2022. Working closely with the Head of School and the Finance and Facilities Committees of the Board of Trustees, the CFOO serves as a strategic thought partner and as a member of the Executive Leadership Team. Lab is searching for a goal-oriented senior leader who will embrace the culture and values of the institution and will work collaboratively to support and lead an innovative institution with high standards and expectations.

## SCHOOL HISTORY

With the belief that “everyone can learn,” Sally L. Smith designed and founded The Lab School of Washington in 1967 for children with learning differences. After traditional schools were not successfully educating her son, Ms. Smith pioneered a learning approach that used art as a gateway for teaching academic skills. Originally a day school for The Kingsbury Center, a diagnostic and tutoring resource for children with learning disabilities, the school was located on Phelps Place, NW in Washington, DC. In August, 1982, The Lab School of Washington was incorporated as an independent non-profit educational institution with its own Board of Trustees and in 1983, the Trustees of The Lab School bought the former Florence Crittenden Home and 3.6 acres of property at 4759 Reservoir Road, NW, in Washington where it resides today.

## At a Glance

**Founded: 1967**

**Total students: 388**

**Students of color: 27%**

**Total faculty (includes student-facing staff/admin): 150**

**Faculty with advanced degrees: 80%**

**Student/faculty ratio: 2.5:1**

**Faculty/staff of color: 25%**

**Financial aid awarded: over \$1.7M**

**Students receiving aid: 18%**

**Endowment: \$3.4M**



After more than fifty years, Ms. Smith’s vision has grown from an approach to help children with learning disabilities similar to those of her son, to a school spanning two-campus that has fostered growth, competency, and confidence in thousands of children and adolescents.

## THE SCHOOL

The Lab School transforms the way students think about themselves and about learning. Here, thinking differently is celebrated. Through an arts-infused education, students with language-based learning differences and ADHD discover how they learn best, hone their talents, and capitalize on their strengths to turn differences into advantages. Utilizing a student-driven, multi-sensory curriculum, education is hands-on and experiential. The expert faculty at Lab provide unparalleled personal attention to students so that they are academically challenged and supported in their journey. Teachers employ effective teaching strategies and cutting-edge research to help students achieve their goals. Small class sizes provide each student with access to unique opportunities, one-on-one attention, and the support of an environment that values each student as an individual. Art is interwoven through all disciplines, helping students to problem solve and think analytically.

Students also benefit from a dedicated team of specialists providing integrated services in the classrooms and individually on campus including occupational therapists, speech-language pathologists, clinical psychologists and clinical social workers. This expert team of professionals work in collaboration with the faculty to ensure a deep understanding of each student’s needs so that each child receives a “whole” education – academically, mentally, physically, and emotionally.



Diversity, equity, and inclusion is supported both in the classroom and throughout the program. The School celebrates many types of diversity including ethnicity, race, socioeconomic status, religion, sexual orientation, family configuration, and gender. Lab is committed to providing an inclusive, nurturing environment where students, faculty, staff, and families can have open, respectful conversations, learn from people holding different perspectives, and challenge one another to see the world differently. In 2016, the School implemented a Diversity, Equity, and Inclusivity Strategic Plan committing to ensuring that the community is welcoming and accessible. The plan focuses around six key pillars; 1) Sustainability; 2) Cultural Competency; 3) Curriculum and Pedagogy; 4) Recruitment and Retention; 5) Community Building Through Connection; 6) Communication. Through these efforts, Lab is working successfully to build a culturally competent, emotionally strong, well-connected community where belonging is a central goal.

In its effort to transform the lives of students it serves and remain a leader in the field of learning differences curriculum, The Lab School of Washington developed six Strategic Priorities in 2019. The priorities include; 1) Student Learning and Readiness; 2) Exceptional Teachers and Leaders; 3) Diversity and Inclusion; 4) Family Engagement; 5) Fiscal Stewardship; and 6) Thought Leadership and Impact.

The Lab School of Washington is a member of the National Association of Independent Schools (NAIS), the National Business Officers Association (NBOA), The Association of Independent Schools of Greater Washington (AISGW), the Association of Independent Maryland Schools (AIMS), and the Council for Spiritual and Ethical Education (CSEE).



## ACADEMICS

The Lab School of Washington provides a rich, rigorous, college-preparatory academic experience for students who think and learn differently, dedicated to helping them discover how they learn best. Students at Lab are immersed in an environment that values hands-on experiences and fosters critical thinking, decision making, and empathy. At Lab, learning is fun. Classrooms are filled with energy, hard work, laughter, and thoughtful discussions.

In the Lower School, made up of Elementary (Grades 1 – 4) and Intermediate (Grades 5 and 6), students are immersed in rigorous academic material through the use of Ms. Smith’s revolutionary model, the Academic Club Method. Teachers are specialized interventionists, trained in the Orton Gillingham approach for reading instruction and The Writing Revolution (TWR) for writing development. The curriculum is individualized to help each student move from beginning to fluent reader. Students are actively engage in small-group collaboration focused on developing the basics of their executive functioning skills.

In Junior High (Grades 7 and 8), Lab students become more independent, self-aware, and confident learners, taking ownership of their education and preparing for the academic rigors of High School and beyond. Students at this age continue to progress through an arts-integrated curriculum with emphasis in STEAM education (science, technology, engineering, arts, and math).

## College Matriculation

Acceptances for the class of 2021 include the following universities and colleges:

American University

Bryn Mawr College

Columbia University

Curry College

East Carolina University

Emory University

Gettysburg College

Goucher College

Guilford College

High Point University

Hobart & William Smith College

Hofstra University

Lynn University

Marist College

Maryland Institute College of Art

New York University

Oberlin College

Radford University

Savannah College of Art and Design

Rochester Institute of Technology

Skidmore College

Syracuse University

University of Arizona

University of Vermont

Ursinus College

West Virginia Wesleyan College



Lab High School students (Grades 9 – 12) dive deeper into the academic curriculum as they prepare to step into the world as global citizens. Using techniques developed throughout their academic path, High Schoolers hone problem solving and critical thinking skills and develop unique solutions. Students build on their strengths and passions, embrace leadership opportunities, and develop strategies to navigate complex issues. High School students enjoy opportunities to develop new areas of interests, take risks, and discover the world including a year-long, junior-year internship, global and domestic travel, senior thesis, and Debate. Beginning in Grade 9, high school students meet with the Lab college advisory team, gaining comprehensive college preparation to ensure each individual student has a plan after graduation that works the best for them academically and socially.

Expanding beyond the DC metro, students with language-based learning differences from around the world can now experience The Lab Difference through Lab's premier virtual program, the [Global Division](#). Uniquely designed for students Grades 3 through 6 and launched as a pilot in 2021, the Global Division brings art and academic integration to the next frontier of learning, offering access to the Lab's curriculum in reading, writing, and math and led by expert teachers highly trained in working virtually with children with learning differences. The Global Division relies on Lab's fifty-plus years of expertise to connect children who learn differently to others across the globe.



## THE ARTS

At Lab, art is essential to academic success. At the Elementary and Intermediate levels, the arts are central to the Academic Club experience. As students progress through Junior High and High School, they select from a wide variety of performing and visual arts courses, including drawing, jewelry making, set design, digital photography, music, drama, and more. Through the immense offerings, students have the opportunity to discover new talents and passions.

## ATHLETICS

Athletics at Lab expose students to important life lessons in pride, humility, leadership, discipline, responsibility, and sportsmanship. Teams are competitive and inclusive with the focus of providing a positive and supportive environment. Student-athletes increase self-confidence, learn new skills, and enjoy the scientific benefits of exercise. High School teams include cross country, soccer, basketball, volleyball, golf, and track.



## STUDENT LIFE

Students at Lab learn, explore, play, and grow in a dynamic community that prepares them to enter a diverse and exciting world. Outside of the classroom, Elementary, Intermediate, and Junior High students can participate in After School activities, providing additional programming where students cultivate friendships and continue to develop social skills. Programs include Fun Fitness, Chess, and Gardening. High School students also enjoy outside social development through numerous clubs and leadership opportunities including Chess Club, Debate Team, Diversity Club, Lab School Women's Group, and Student Advisory Council. In addition, High School students venture beyond the campus walls to support the local community in projects such as hunger-relief, mentoring, clothing drives, and beautification projects. All High School students are required to complete a minimum of 100 hours of community services.





## WASHINGTON, DC

The Lab School of Washington is situated in the Palisades neighborhood of our nation's capital of Washington, DC. Lab is located minutes from historic Georgetown, the Potomac waterfront, and a short drive to the museums, monuments, and other local historic sites. Steeped in history, this culturally rich city is home to more than 70 museums and art galleries, 175 embassies and cultural centers, and countless theaters and outdoor events offering year-round entertainment options.

Outdoor enthusiasts enjoy all four-seasons, numerous parks and green spaces, along with 60 miles of bicycle and pedestrian tracks for avid bikers and hikers. Sports lovers cheer on several professional athletic teams, including the Capitals, the Wizards, the Nationals, and the Washington Football Team. Washington, DC is a popular tourist destination, but also scores highly on world livability rankings. The city's diverse neighborhoods provide distinct and unique areas to enjoy culture and arts events, food, and shopping. The city also has a very active environmental community and has been at the forefront of many global discussions about our natural environment.



## CHALLENGES AND OPPORTUNITIES

The new Chief Finance & Operations Officer (CFOO) will succeed Laurelle Sheedy McCreedy, who is retiring after serving Lab since 2011. She has been instrumental in professionalizing the work of the Business Office in support of the Head of School and the Board and providing wise counsel to many as an effective and sought-after mentor. Operationally, McCreedy has focused on instilling best practices into the finance and accounting business office functions, which include Controller, HR, AR, AP, and Purchasing. The Director of Facilities and Operations, who reports to the CFOO, leads a team in providing repairs, maintenance, and operational support. Strategically, the CFOO designs and implements practices that ensure the financial sustainability of the School, plans for plant and facilities improvements, and assesses and creates risk management practices to protect the community.

## KEY INITIATIVES FOR THE CFOO IN THE NEXT FEW YEARS INCLUDE:

- Support the HoS in designing the ideal staffing structure.
  - The School's small student to faculty ratio speaks to the quality of instruction and singular attention paid to each student. However, salaries lag behind those of DC-area, and the new CFOO will be charged with overseeing ways in which faculty compensation can be increased and the administrative structure examined for efficiencies.
  - The School is in the midst of reorganizing into three divisions, rather than four, and the consequent realignment will present pedagogical and operational opportunities and pose pedagogical and operational challenges. This reorganization also comes at a time when the School has embarked on a new venture, providing virtual learning opportunities for a small number of students domestically and internationally. Although not meant, necessarily, to serve as a profit center, this global learning project will have a favorable impact on the reputation of the School.



- Support the HoS in realigning the relationship between the School and the public school jurisdictions which currently place approximately 70 students at the School. Lab is the only independent school in DC that enrolls publicly funded students. The acceptance of public funding has historically increased accessibility to Lab, while it also presents additional complexities in terms of tuition-setting, jurisdictional requirements, and staffing and hiring. Working with the HoS and BOT to fully grapple with these complexities and their impact on the operating budget will be a central topic for the new CFOO.
- Continue to find ways to increase opportunities for student financial assistance.
- Ensure that identified deferred maintenance at the Reservoir campus is adequately funded and completed, including roughly \$8-10 million for HVAC systems, security and fire alarm systems, and an elevator. Additionally, a campus playground must be evaluated for drainage and upgraded equipment.
- Evaluate options for housing the elementary program (grades 1-4) presently occupying a leased building, known as the Foxhall campus, less than a mile away from the Reservoir campus.
- Continue leading the School's risk management efforts. The outgoing CFOO has significantly helped mitigate risk, but the task is ongoing. International and domestic school trips, an urban setting, a summer camp, contracted transportation services, and aging facilities all present challenges for managing risk.

Head of School Kim Wargo's style is to seek out opinions and input from her senior administrative team, synthesize that information, and then act decisively. She gives her direct reports ample autonomy and doesn't mess with the details. In turn, the Board of Trustees is focused on the big picture – where is the school going and how can we help it get there? The new CFOO must buy into the mission of this special, labor-intensive school. Yes, it is an independent school, but it serves a unique student population and has forged, and continues to forge, a national reputation for educating children with learning differences.



## CHIEF RESPONSIBILITIES

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

- Provide school-wide strategic leadership, analysis, and management of finances and operations, directly supervising five members of the Business Office and the directors of Educational Technology and Facilities and Operations.
- Serve on the Head of School's Administrative Team and lead, co-lead, or participate in several other teams and committees.
- Oversee all financial reporting, including the development and approval of the annual operating budget, periodic reports of operating results compared to the budget, and bank covenant compliance. Audiences for financial information include the Board of Trustees, the Finance Committee, the Head of School, other administrators and internal departments, lenders, and other authorities.
- Establish financial and capital strategies that enhance the long-term value and are consistent with the strategic priorities.
- Build and/or maintain the School's short- and long-term strategic financial models.
- Oversee the administration of the School's endowment; execute endowment and investment policy; implement investment decisions of the Investment Committee; and coordinate with the endowment consultants, investment managers, and custodians, ensuring effective endowment allocations, performance, and reporting.
- Oversee School operations including personnel, maintenance, and vendors.
- Oversee and manage all Business Office operations including budgeting and accounting, financial modeling and analysis, payroll, human resources, risk management, and benefits.
- Evaluate the Business Office's strengths and weaknesses and develop goals/plans and systems that will improve department performance and customer service.
- Oversee the annual financial and 403b plan audits and filings of tax returns.
- Serve as chief staff liaison to Board committees, principally the Finance and Facilities committees, working closely with Committee chairs and organizing agendas and meeting materials and presenting at meetings.



- Negotiate with lenders when necessary to ensure that funding is secured for needs of the school and ensure compliance with loan terms.
- Ensure that the School is in compliance with all local and state reporting requirements.
- Collaborate effectively with and provide support for Advancement, Admissions, and other departments.
- Coordinate with the Director of Facilities and Operations on oversight of the physical plant, grounds, and construction functions; help plan and direct all replacements and renewals of the physical plant.
- Publicly represent the School in a positive and proactive way, collaborating with other School administrators, neighbors, and public officials.
- Maintain appropriate professional memberships and represent the school at related meetings and conferences.
- Provide sound and consistent employment policies, adequate staffing levels, compensation, and appropriate benefits programs for all facets of school operations.
- Help implement and administer, along with the HR Director, all employee benefit programs including health insurance, retirement, worker's compensation, life insurance, and other related plans.
- Collaborate with the Head of School and other senior administrators on providing leadership regarding employee hiring, termination, compensation, and management.
- Manage and make decisions regarding insurance programs: property, casualty, medical, workers' compensation.
- Work collegially within a diverse community and communicate effectively with diverse populations.
- Demonstrate an interest in diversity, equity, inclusion, and belonging work and participate in professional development as related to DEIB work.



## DESIRED QUALITIES AND QUALIFICATIONS

- Bachelor's degree required, MBA or CPA preferred.
- 10-15 years of senior-level experience creating and executing financial planning and management strategies.
- Superb communication skills; excellent written, verbal, and presentation skills
- Demonstrated ability to take complex subjects, distill them, and then communicate them to varied audiences.
- Experience in an independent school preferred though individuals with strong financial and leadership skills are welcome.
- 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 human resource management, employee benefits (including pension plans), and payroll procedures. Knowledge of business and not-for-profit accounting policies, procedures, practices, 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.
- Customer service oriented.
- An entrepreneurial mindset.
- Committed to equity and inclusion practices.
- Evident integrity.



## 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:

### **John G. Clark**

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