



## **Opportunity Statement**

### **Director of Finance and Operations Friends School - Boulder, CO**

Friends School is an independent Preschool through 8<sup>th</sup> Grade. Founded in 1987, it was initially run by a small group of dedicated parents who envisioned a school where children are revered for who they are and where the whole child is educated -- head, hand and heart. Today, Friends continues this vision. In a diverse community students are challenged to reach their potential through experimentation, exploration and direct instruction in an experiential environment that strives for academic excellence, creative expression and social responsibility. Friends has small classes with low student/teacher ratios and an active, involved parent community.

We seek a Director of Finance and Operations to oversee the school's financial management, plant operations and maintenance, and provide business guidance to the Community Board and the Head of School. The main areas of focus for this senior leadership position include overseeing and managing the school's finance, accounting, audit, facilities, human resources and technology.

Reporting to the Head of School, the Director of Finance and Operations provides financial analysis and strategic financial vision for the school's future to the Head of School and the Community Board.

Our top candidate will have demonstrated upward career mobility in roles that encompass aspects of financial planning, accounting and operations. A broad range of experience gained in an educational institution or non-profit would be beneficial. Friends School seeks a strategic professional who is hands-on and thrives on attending to multiple priorities.

*Multi-faceted responsibilities include but are not limited to:*

#### **1) Finance and Accounting**

- Oversee the School Accountant – accounting, purchasing, accounts receivable, accounts payable, and payroll.
- Review all school contracts – both internally and externally generated.
- Manage banking and cash including short-term investments, and loan covenant documentation.
- Oversee Investment accounts with oversight from Investment Committee
- Prepare financial statements
- Manage the audit and tax return process
- Assess school's risk management
- Complete annual liability insurance analysis with school's insurance agent
- Manage Student Enrollment Contract process, including contract issuance, financial aid awards, and reconciliation of admissions with Director of Admissions.

#### **2) Modeling, Forecasting, Board work**

- Develop the annual preliminary, final operating budgets, and 5-year forecast.
- Meet regularly with the Treasurer of the Finance Committee.
- Manage, lead and provide support for the audit, finance, facilities, investment and risk management committees.
- Attend Board meetings and retreats and provide pertinent information and decision support.
- Provide financial analysis support for all programs.

### 3) Employee Benefits

- Work with school's Professional Employment Organization (PEO) to provide employee payroll and benefits. Annual analysis of PEO to determine best fit for the school.
- Onboard all new employees and terminate departing employees with the school's PEO.
- Generate employment contracts/letters of agreement for new and continuing staff.
- Complete health care and benefits plan analyses annually and make adjustments as necessary. Assure plans are competitive and in compliance with regulatory requirements, including, healthcare and 403(b) retirement plan.

### 4) Operations/Facilities/Systems

- Oversee the Facilities Manager in scheduling and coordinating all outside rentals and the cleaning of the facilities.
- Oversee Facilities Manager in annual review and renewal of existing contracts, or obtain bids and award new contracts, for the maintenance operations. These include overall facility maintenance, cleaning service, lawn service, snow removal, fire mitigation system, and fire alarm monitoring.
- Obtain comparative bids for major repair/remodel projects.
- Update the annual and the 10-year facility plans. Review plans with Facilities Committee of the Community Board on an annual basis.
- Work with Director of Technology in maintaining/updating phone system, infrastructure for school computer systems, and databases.

#### ***Professional and Personal Qualifications:***

- 5+ years progressive financial and administrative experience in an educational institution or non-profit organization. Previous leadership experience desired.
- Bachelor's degree in business, accounting, finance or related field.
- Advanced knowledge of MS Office Suite and QuickBooks.
- Expertise in financial analysis, business processes, and internal controls.
- Proven ability to work in a team environment, develop effective interpersonal relationships, manage staff, provide superior service, and communicate verbally and in writing.
- Integrity and honesty.
- Fun to be around with a sense of humor and flexibility.
- Effectively communicate complex financial terms and situations to those without a financial background

#### ***Why work for Friends School:***

The Director of Finance and Operations receives a very competitive salary, TIAA-CREF retirement benefits, comprehensive health insurance, life insurance, professional development, tuition remission, and competitive time-off benefits.

#### ***If Friends School is Right for You –***

We encourage you to apply if educational or non-profit financial and operations leadership is your passion. Additional information about Friends School can be found at [www.friendsschoolboulder.org](http://www.friendsschoolboulder.org). This is an immediate hire position. Local candidates are encouraged to apply. Out-of-area candidates will be considered who can relocate immediately without relocation assistance.

#### ***Please submit the following materials for consideration:***

- Cover letter outlining why Friends School and this position is exciting to you
- Resume which includes dates of previous employment
- Four professional references

Please send all documents in PDF format to [jobs@friendsschoolboulder.org](mailto:jobs@friendsschoolboulder.org). We will contact top candidates for an interview. Final candidates are subject to background and credit check. Please, no phone calls to the school, regular mail or fax submission- we strive to be paperless.

Friends School is an Equal Employment Opportunity Employer.