



POSITION STATEMENT

CHIEF FINANCIAL AND OPERATING OFFICER

OVERVIEW

Brooklyn Friends School (BFS), a thriving PreK-12 Quaker school located in vibrant Downtown Brooklyn, seeks a visionary leader to serve as **Chief Financial and Operating Officer (CFOO)** to guide a vibrant community of eager-to-learn and engage students and highly committed and talented colleagues (BFS uses the all-inclusive term, colleagues, to refer to all rather than one that delineates faculty/staff). Founded in 1867, Brooklyn Friends School's pillars of social justice, service learning/civic engagement, and Quakerism, serve as guideposts for our action-oriented collective work. Our [school's history](#) has been illustrious and reflective of the expansive nature of human experiences. Guided by our [mission](#), BFS provides a dynamic, diverse, and robust social/emotional environment and academic program that cultivates compassionate, intellectually curious, and confident changemakers. As a school, we affirm that human diversity includes, but is not limited to: race, ethnicity, culture, national origin, religion, gender, gender identity and expression, sexual orientation, age, socioeconomic class, family structure and physical ability, as well as diversity of thought, talents, and learning style.

[This short video](#) gives you a glimpse into our contemporary experience.

FURTHER DETAILS - OUR SCHOOL

One of New York City's oldest, continuously operating independent schools, Brooklyn Friends School (BFS) is a college preparatory, co-educational, Quaker day school with 800 students in grades pre-kindergarten through 12. Located three blocks from the Brooklyn Bridge in the heart of the "Brooklyn Renaissance" in the borough's civic, cultural, and business district, the institution is surrounded by four colleges, municipal and judiciary buildings, cultural institutions, a variety of social service agencies, large corporations, and a flourishing retail district. The school's primary Pearl Street facility, which houses preschool through middle school students, has forty-five classrooms, two media centers, two libraries, five science laboratories, two gymnasiums, two dance studios, six art studios, a cafeteria, a rooftop playground, and a 280-seat theater. Located just a short walk away on the Metrotech campus at Lawrence Street, the Upper School occupies a

recently renovated 40,000 square foot space on three floors and supports a broad academic high school curriculum including the International Baccalaureate program for 11th and 12th graders. The high school facility boasts more than forty classrooms, seminar rooms, and faculty offices, as well as four science laboratories, four visual art studios, three music studio classrooms, a black box theatre classroom, dance studio, fitness center, state-of-the-art research library, and café. Early childhood education is provided for two-year olds at The Family Center at Brooklyn Friends, a small facility for 36 students less than a half mile away on Schermerhorn Street.

The school is governed by a devoted and talented Board of Trustees. Ex-officio members of the board include the Head of School and the Chief Financial and Operations Officer.

Brooklyn Friends School was founded by the Religious Society of Friends in 1867 as a coeducational grade school with an initial student body of 17. A kindergarten class was added in 1902, followed by a high school division in 1907, a preschool in 1985, and a Family Center in 1992. In 2009, at the culmination of a seven-year process, the school withdrew from its incorporation status within the New York Quarterly Meeting, obtained its own charter and 501(c)(3) status, and became separately incorporated. Although the percentage of Quaker families and staff at BFS is relatively small, the school's core Quaker values remain essential components of its educational philosophy and practices.

BROOKLYN FRIENDS SCHOOL'S CORE VALUES

Academic and Personal Excellence

Those who aspire to integrity, embrace challenges, and internalize the goal of being the best they can be, enable the full development of their minds, character, and spirit. They build a strong foundation not only for success in school, but for a rich and rewarding life as well.

Community

A community bound and dedicated to the School's mission provides an environment of mutual care and teaches its members how to work together in the common pursuit of learning.

Diversity, Equity, and Belonging

A diverse school community creates an enriched learning environment through the understanding, respect of, and comprehensive inclusion of differences. It prepares students for living in, appreciating, and positively impacting our diverse and global society.

Respect

The dignity of all and a sense of inclusion are fostered by active listening to and active engagement with others. Respect is most powerful when it characterizes the relationships and interactions between and among all segments of the school community: parents, students, teachers, staff, and alumni/ae.

Civic Engagement and Service Learning

Graduates with a lifetime commitment to being positive changemakers and making the world a better place fulfill a major aspect of the school's mission.

Quakerism

Quaker Meeting and other dedicated periods of silence provide precious opportunities to be in more direct contact with the light within and among each of us.

THE OPPORTUNITY

Brooklyn Friends School has an operating budget of \$33 million and total endowment net assets of \$10.5 million of which \$2.3 million are permanently restricted. The Upper School facility was financed by debt, which currently stands at approximately \$11.9 million. In May 2019, colleagues at the School voted to form a collective bargaining unit under the National Labor Relations Act. The unit, which is organized under UAW Local 2110, contains all non-supervisory teaching and non-teaching employees not otherwise excluded under the Act. The School has been engaged in ongoing negotiations with the collective bargaining union with the goal of attaining a collective bargaining agreement and hopes to have an agreement in place soon.

Like many independent schools, however, BFS continues to build goals that address enrollment, minimizing of tuition increases, and strategically addressing the institution's financial sustainability in the coming years. The Chief Financial and Operations Officer position consolidates responsibility for several operational departments that had previously fallen under the Assistant Head of Facilities and Operations. With this change in structure, the CFOO will now be able to develop, implement, and maintain school-wide operating protocols and controls that will help Brooklyn Friends School continue to grow and thrive.

Primary Responsibilities

- Reporting to the Head of School and working closely with the Treasurer of the Board of Trustees, the Chief Financial and Operations Officer (CFOO) will manage and direct all of Brooklyn Friends School's business practices and operations,

including finance, human resources, information technology, facilities, security, dining services and other functions as necessary. As a member of the Administrative Leadership Team, this individual will participate in strategic planning and high-level decision-making.

- The CFOO will be accountable for the financial health and stewardship of the School, providing leadership and direction for financial policy and overall management of financial operations. This individual will ensure the strength and capability of a six-person finance department and provide direction and management of the budget, financial reporting and controls, systems, forecasting, accounting, audit, investment and treasury, while connecting financial processes and procedures with Brooklyn Friends School's overarching mission.
- The CFOO will utilize financial modeling, analytics, forecasting, metrics, and benchmarking to provide vital information and decision support to the School's Leadership and Trustees.
- This individual in this role will give advice and guidance in the development of sources of alternative revenue to augment the operating budget.
- The individual in this role will act as a catalyst for the vision of the Head of School and the strategic plan as determined by the Board of Trustees, including infrastructure improvements, translating institutional priorities into action plans, and implementing efficient business procedures and sound policies that support the complex demands of the School.
- It is critically important that the CFOO gain the trust and confidence of the Head of School and the Board, and provide support to the Finance, Audit, and Executive Committees, as appropriate.
- The CFOO will maintain points of intersection with members of the Administrative Leadership Team, serving as their partner, advisor, and implementer for internal business and financial matters.
- As a matter of priority, the CFOO will seek to thoroughly understand Brooklyn Friends School's history and culture, its mission, academic programs, colleague body and Board, its finances and advancement efforts, and substantive issues. It will be important to establish a strong working partnership with the Head of School and other members of the Leadership Team while building collaborative relationships between finance and other administrative and academic functions at all levels. As the Board resumes work on a new strategic plan, the CFOO will play a critical part in its development and provide critical decision support.

The CFOO will also be responsible for the following:

FINANCE

- o The financial stewardship of the School; in partnership with the Head of School, manage the preparation, presentation, approval, and implementation of the school's annual operating and capital expenditure budgets; propose actions on tuition, financial aid and compensation in the context of a balanced budget
- o Support the strategic financial planning of the Board of Trustees by producing financial analysis, sensitivity/scenario analysis, by modeling financial outcomes of ongoing and prospective initiatives, and by providing long-range financial projections of operating results
- o Establish work objectives, priorities, and responsibilities to ensure efficient and effective operations of the Finance Office
- o Oversee all aspects of the financial function, broadly consisting of Tuition Management, Financial Aid, Disbursements, Procurement, General Ledger Accounting, Cash Management, Financial Statement Audit, Risk Management, Debt and Debt Compliance
- o Develop in-depth financial/management reporting and related analysis for the Head of School and for presentation to the Board and relevant Committees
- o Develop, maintain and execute financial and accounting policies and procedures; ensure that all necessary internal controls are in place and working effectively
- o Foster banking relationships and oversee financial obligations to provide maximum benefit to the school's financial objectives
- o Monitor and report on the School's investments to Trustees; implement investment policies and decisions
- o Lead the School's risk management efforts; maintain adequate cost-effective levels of coverage to protect property and for liability
- o Ensure that the necessary systems, processes, technology, and controls are in place to carry out all financial and human resource functions of the school
- o Work with the School's auditors and the Audit Committee of the Board of Trustees to facilitate the annual audit of the school's financial statements

- o Serve as a member of the Tuition Assistance Committee

HUMAN RESOURCES

- o Establish work objectives, priorities and responsibilities relating to the Human Resource function; propose and implement initiatives that strengthen the HR function at the School and promote a culture of excellence.
- o Oversee all aspects of the human resources function, broadly consisting of employment policies and practices, statutory requirements, compensation and benefits administration, employee relations, performance evaluation, disciplinary procedures, recruitment, training, and safety.
- o Work with the Director of HR, develop, communicate and execute policies that reflect the intersection of best-in-class Human Resource policy and school culture; ensure that policies are adequately documented and up-to-date.
- o Ensure that employment practices comply with all applicable employment laws and regulations.
- o In partnership with the school's labor counsel, act as liaison with the labor union representing school colleagues in the collective bargaining unit; serve on the negotiating team and provide advice on the terms for a collective bargaining agreement.
- o Work closely with school leadership to administer collective bargaining agreement and meet responsibilities defined by it.

OPERATIONS

- o Oversee the management of all aspects of operations, including facilities, security, and food services.
- o Establish work objectives, priorities and responsibilities for the Director of Facilities to ensure the efficient operation of the entire physical plant, including maintenance, equipment, and plant renewal.
- o Work with the Director of Facilities to ensure compliance with all required environmental, health and maintenance standards and local, state and federal regulations.
- o Oversee School security; approve School safety and evacuation plans and procedures.

- o Establish overall property, plant and equipment capital expenditure strategy and priorities for buildings maintenance; develop a 10-year plan for replacements, renewal, and improvements.
- o Propose and obtain Board of Trustees approval for all major expenditures.
- o Review and approve bid proposals and selection of contractors; ensure compliance with contractual agreements and budget restrictions.
- o Establish policies relating to use of school facilities; manage the allocation of building space for offices and school activities as well as summer use of facilities.
- o Negotiate contracts with outside vendors, including for health and food services.

INFORMATION TECHNOLOGY

- o Partner with the Director of Academic Technology and Innovation to establish overall technology infrastructure and operational strategies for the school; ensure that the Director of Academic Technology and Innovation establish technology goals that pertain to needs and priorities relating to information technology for the school.
- o Review and approve all major technology expenditures, bid proposals and vendor/contractor selection.

Qualifications

- Bachelor's degree required, preferably in accounting, finance, or business administration; CPA and/or advanced degree in a related discipline; MBA or master's degree
- 10+ years of relevant professional experience in finance and operations, with at least 5 years in a senior financial leadership role
- Proven success in a senior leadership role with responsibility for the management and oversight of finance and accounting operations, financial planning, analysis and reporting, budgeting, financial systems and associated administrative processes.
- Experience in an independent school or private educational institution of similar size and complexity; experience working with a board of trustees preferred
- Record of financial discipline, including the establishment and maintenance of financial and operational policies, procedures, controls, and standards

- Experience in the practice of human resources management in an educational setting; experience in a unionized organization is a plus
- A vast portfolio of supervisory experience and management of construction projects
- Experience working with enterprise systems, particularly as they relate to accounting and financial reporting

Skills and Knowledge

- Proven problem-solving and planning capability, with a demonstrated ability to think strategically
- Expert management of multiple priorities, functions and activities
- Excellent oral, listening and written communication skills, with ability to explain financial matters to various constituencies in a manner that is readily understood
- Knowledge of relevant regulatory, legal, and tax matters, including federal, state and local employment laws
- Facility with computer applications related to finance office functions; proficiency with Excel and Google applications

Leadership

- A leader who, through reasoning and intellect, guides others in a calm and respectful manner to achieve unity in making decisions that support the organization's broader educational mission and long-term success
- A strategic thinker who sees the "big picture," anticipates and envisions future needs, and is able to articulate a well-conceived plan to achieve goals
- A confident and experienced manager who directs the efforts of others through open communication and collaboration
- A secure leader who motivates and empowers people through artful delegation while retaining ultimate accountability
- A person whose management style is characterized by tenacity, flexibility, empathy, a willingness to think creatively, and lead by example

Personal Attributes

- Demonstrates ethics and integrity in the workplace, imparting credibility, inspiring the trust of others and upholding an organization's values
-
- Acts with a high degree of professionalism, discretion and judgment that is consistent with school culture, standards, practices, policies, procedures, regulations and/or government law
- Motivated by a strong work ethic and dedication; is results oriented, adept at planning, prioritizing, organizing and following through
- Demonstrates emotional maturity, team-oriented leader with excellent interpersonal skills with the ability to maintain effective working relationships with colleagues, leadership, board members and union officials
- A collaborative individual who seeks unity in decision-making but also bases conclusions on facts and principles and is able to make difficult decisions
- Encourages others to thrive, respects individual differences, and values the tenets of Quakerism that shape the school's culture
- Understanding of independent schools
- Joy, patience, and compassion at core of candidate's humanity

To apply, please provide the following:

1. Resumé/Curriculum Vitae – Candidates are encouraged to include hyperlinks to applicable examples of their work in their professional journey.
2. A Personal Statement/Cover Letter addressed to Head of School, Crissy Cáceres, that expresses the ways in which your journey has demonstrated the school's pillars of Equity and Belonging, Quakerism, and Service Learning/Civic Engagement and how you see yourself further making them actionable within the context of your leadership.
3. List of four references with name, title, relationship, and contact information
4. Optional: Any other documents/artifacts from your experience that you think represent you in an authentic manner
5. Email the above as attachments or (if possible) one comprehensive PDF to hr@brooklynfriends.org. Please put as subject line, **Chief Financial and Operating Officer**. Thank you!