Oregon Episcopal School, the oldest independent Episcopal school west of the Rockies, announces a search for a Chief Financial Officer who will partner with the School’s new Head and provide strategic support and sound financial management to help OES fulfill its mission and execute its newly minted strategic plan. The School’s location in the Northwest and its affiliation with the Episcopal Church combine to welcome families of all faiths and backgrounds who seek an education that is as committed to academic achievement as it is to the social, emotional, artistic, physical, and spiritual development and global citizenship of its students.

Overview
Located in a handsome set of modern buildings on 59 acres in a residential suburb of Portland, OES is highly respected locally and nationally for its strong emphasis on academic achievement within the context of a well-rounded educational program that features experiential and inquiry-based education, service learning, spiritual development, and community responsibility. The breadth of the school’s program intentionally supports its belief that students possess a broad array of talents, some of which they know, while others remain to be discovered. Those talents are best revealed and developed in a deeply relational community that offers a range of activities and experiences in the classroom and in nontraditional settings across the region and the world.

With 840 day and boarding students in grades PreK-12, OES has a strong sense of community that supports students’ development, stimulating students to consider not only what they must learn intellectually, but how they meet each other’s needs and the needs of those outside the school’s grounds. To that end, the School takes advantage of the opportunities in Portland as well as the rich natural offerings found in the Cascade Mountains and the Oregon Coast. The School also sponsors global travel-learning programs for students each year.

History
Founded in Portland by the Episcopal Bishop of Oregon in 1869 as St. Helen’s Hall, a boarding and day school for girls, the School has continued to evolve even as it remains true to its founding ideals. The history, which is well described on the School’s website, affords much pride in its longevity even as the School recognizes that the move to the modern campus in the 1960s and the merger with Bishop Dagwell Hall, an all-boys school, in 1972, have forged a new identity. The past 20 years have seen substantial growth in the infrastructure and facilities.

Mission
The purpose of Oregon Episcopal School is to prepare students with promise for higher education and lifelong learning and to enhance their intellectual, physical, social, emotional, spiritual, and artistic growth so that they may realize their power for good as citizens of local and world communities.

**Vision**
Connecting people, ideas and cultures to advance knowledge, create solutions and enhance meaning.

**Finances and Development**
The School’s finances have been carefully and strategically managed in recent years. With an annual budget of $22 million, the School allocates a little over $1.8 million in financial aid. The endowment rests at approximately $21 million, and the School raises about $750,000 in annual giving, although giving has been level during the recession years. Over the last 10 years, several buildings have been constructed, remodeled or expanded. The infrastructure of roads and housing for buses has been completed. The School carries debt of $12 million, which it considers manageable. The School has healthy operating reserves, both by design and as a result of budget surpluses in recent years.

**Admissions and Enrollment**
The School’s excellent reputation, and location just outside urban and high tech Portland, ensures a steady supply of students prepared to thrive at OES. Admission continues to be strong and selective. The School’s commitment to socio-economic diversity is reflected in financial aid awards that equal 10% of tuition for approximately 15% of the students. The School’s early and sustained commitment to diversity has created a student body that is 34% students of color, including international students; 28% domestic students of color. The student body has grown in the past seven years from 747 students to 840, a significant increase that reflects the sustained interest in the School. The retention rate over the past three years has averaged 92.5%.

**Challenges and Opportunities**
Oregon Episcopal School is at an exciting moment in its development, ready to build on its 140-year history and its fine reputation within the community by expanding its visibility and beginning to attend to the facilities goals of the Strategic Plan, particularly a new gym, a Lower School building, and a performing arts center.

The first obligation of the next CFO will be to provide active management of a five-person business office that desires direction, more accountability and a larger sense of value within a school community that has responded enthusiastically to first-year Head of School Mo Copeland. Mo previously served as Head of School at St. George’s School in Spokane, Washington, following over a decade as a teacher and administrator at the Lakeside School in Seattle. Her clear leadership style and high expectations for OES have significantly eradicated feelings of uncertainty and concern as a result of changes in leadership during the prior six or seven years.

The new CFO will need to be a strategic partner with the Head and other senior administrators as the School commences a comprehensive capital campaign with ambitious facilities projects. As a consequence, forging close relationships with the Director of Development and the Director of
Facilities Management, in particular, are key to success. Additionally, being an effective and clear communicator to the School’s various constituents – faculty, administrators, staff, parents, students and trustees – will be a requisite for the new CFO.

Additionally, the new CFO must work closely with the Head of School and the Director of Admission as the School expands its emphasis on diversity, particularly socio-economic diversity.

OES is in sound fiscal health, with no glaring red flags that might divert the new CFO’s main attention from being a true strategic partner in strengthening the School in all ways. There is a tremendous amount of good will within the larger OES community, and the next CFO will benefit from its support and enthusiasm.

**Core Responsibilities**

Reporting to the Head of School, the Chief Financial Officer will be responsible for all financial activities of the School. This Executive will be a member of the OES Senior Administrative Team and will serve on the School and Board committees responsible for finance, investments, strategic planning, buildings and grounds, and financial aid.

- Providing counsel and support to the Head of School, Board of Trustees, and faculty and staff on the financial impact of all administrative matters.
- Developing financial models for strategic planning and long-term budgeting and business planning.
- Managing the day-to-day accounting and finance activities, including establishing appropriate policies and procedures.
- Creating capital and annual operating budgets.
- Working with the Board and staff to develop processes and financial structures that will optimize cost effective performance and achieve maximum operating efficiencies.
- Researching and recommending compensation, benefits and insurance packages for faculty and staff.
- Mentoring and leading a staff of five (Controller, HR specialist, Accounts Payable, Accounts Receivable, Administrative Assistant).
- Being proactive and strategic in bringing issues of significance to the attention of the Head and the Board.

**Desired Experience and Characteristics**

The favored candidate is a person of unquestioned integrity with a love of accounting combined with the ability to understand and articulate clearly the School’s financial model. S/he should
also be approachable, outgoing, energetic, and confident, with strong emotional intelligence, fine personal values and excellent communication skills. OES’s best match is an administrator who sets clear expectations for staff and holds them accountable, yet doesn’t micro-manage. As well, s/he should possess an accessible style, a sense of humor, and a compassionate nature. The new CFO must be an individual who can enthusiastically mentor and encourage his or her team and build solid relationships with all constituent groups at the School.

The new CFO preferably has a non-profit background, ideally in the education sector if not in independent schools. S/he should be open to new ideas, a strategic thinker, a collaborator, and a champion for all employees. Above all, the successful candidate should possess a positive attitude, see the “big picture,” and be the ultimate team player.

The Search Process
Oregon Episcopal School has engaged Carney, Sandoe & Associates to assist with the search. Please send all information and address all inquiries to:

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A candidate should submit the following materials, electronically, in PDF form, if possible, by April 1st:

- a cover letter explaining his or her qualifications for becoming the next CFO
- a current resume
- the names, e-mail addresses, and telephone numbers of five references

Oregon Episcopal School is an Equal Opportunity Employer dedicated to promoting diversity in the workplace and to seeking a diverse and broad spectrum of qualified candidates. The School does not discriminate in employment on the basis of race, religious creed, color, national origin, ancestry, physical disability, mental disability, medical condition, marital status, sex, gender or gender identity, age, or sexual orientation.