



Chief Finance and Operations Officer

Trinity School, a premier elementary day school serving preschool to Grade 5 in Menlo Park, California, seeks a Chief Finance and Operations Officer to join our community.

Overview: Trinity School is a premier elementary day school serving preschool to Grade 5 in Menlo Park, CA. Located across the street from Stanford University and on Sand Hill Road, Trinity is a purposefully small school. The school has partnered with parents for over fifty years to grow children, one at a time, into motivated and capable problem solvers with big hearts. Trinity School continues this tradition by envisioning the primary role of the Chief Finance and Operations Officer (“CFOO”) as an experienced school leader and a critical strategic partner working closely with the Head of School, the leadership team and under the oversight of the Finance Committee and the Board of Trustees ensuring the continued financial health of the School. The Chief Finance and Operations Officer is responsible for creating, leading, and managing a comprehensive operations program that incorporates best practices in financial controls, facilities management, and academic technology initiatives. The program is built upon quantitative analysis, strategic decision-making, and an ethos of continuous improvement while fostering a culture that emphasizes strong financial controls, personal relationships, high-touch customer service, communication and transparency, entrepreneurship, flexibility and collaboration.

Job Summary: The CFOO is responsible for managing the school’s resources in a prudent and careful manner, consistent with the mission and goals of the school. She/he understands the mission, standards and policies of the school, contributes to their formulation and evaluation, and is able to interpret them to others. The CFOO will play a key role in advancing the School’s strategic goals and vision. She/he manages the financial, accounting, human resource and facilities activities of the organization. The CFOO oversees operations, providing leadership and support to grounds, facilities, custodial services, and information technology staff, ensuring collaboration, communication, and stewardship of resources. The CFOO establishes financial and capital strategies, acts as a thought partner for the Head of School and will enjoy many

opportunities for innovative thinking, project management, staff advocacy and development, and input to shape the future of the School. This position description is designed to outline primary duties, qualifications, and job scope but not to limit the incumbent nor the organization to adjust the work identified. It is Trinity School's expectation that each employee will offer his/her services wherever and whenever necessary to ensure the success of the School's endeavors. Desirable candidates will possess significant financial acumen, high emotional intelligence, and interest in engaging in a lively and fast-paced academic community.

Essential Duties and Responsibilities:

- Maintain a highly collaborative and close working relationship with the Head of School to provide strategic leadership, analysis, and management of institutional goals, finances and operations.
- Serve on the Administrative Leadership Team and lead, co-lead, or participate in several teams and committees inclusive of serving as chief staff liaison to the Finance and Investment committees of the Board.
- Oversee all business office functions including all financial reporting. Prepare interim financial statements, including balance sheet, income statements and all supporting schedules and notes to statements for Board review.
- Partner closely with the Finance Committee Chair to develop the annual budget and long-term financial modeling and forecasting.
- Provides transparent financial reporting and planning that builds trust among administrators, faculty and staff, the board, and all constituents.
- Plan, coordinate and oversee the annual financial audit, ensuring audit timeliness and completeness. Manage annual preparation and filing of Form 990.
- In partnership with the Investment Committee, oversee the administration of the School's investment portfolio.
- Build and/or maintain the School's short-and long-term strategic financial models.
- Maintain strong relationships with banks and lenders to ensure applicable funding is secured for the operational needs of the School as well as compliance with loan/debt covenants.
- Oversee all School operations including personnel, maintenance, facility usage, and vendors.
- Administer and manage all employee benefit programs including health insurance, retirement, worker's compensation, life and disability insurance, and other related plans. Manage insurance programs including property, casualty, and directors' coverages.
- Collaborate effectively with Advancement, Admissions and Enrollment, Information Technology, and other departments.
- Provide strategic and operational oversight of the School's auxiliary operations including extended care, summer programming, and facility rentals.

- Ensure compliance with all local and state reporting requirements. Serve as liaison to the local Menlo Park community.

Qualifications and Personal Attributes

- Bachelor's degree in accounting, finance, business management, or related area
- 5 years minimum of senior-level experience creating or executing financial planning and management strategies;
- Experience in an independent school setting preferred;
- Strong knowledge of best practices and industry standards on independent school finance and operations inclusive of human resources, and non-educational systems that support the School's institutional strength and future viability;
- Demonstrated understanding of current challenges, trends, and issues facing independent schools;
- Experience managing a team, setting clear goals, responsibilities, expectations and methods of accountability;
- Proven record of accomplishment designing, implementing, and managing large-scale organizational change;
- Ability to interface with all constituencies of the Trinity School community – the head of school, the leadership team, faculty, staff, students and their parents, the Board of Trustees, Church relationships, alumni parents, local residents, and friends of the School;
- Demonstrated ability to understand complex subjects, distill them, and then communicate them to varied audiences;
- Approachable, and welcoming demeanor with good listening, humor, tact, intuition, and confidentiality;
- A leader who brings joy, kindness, maturity, and flexibility to the school environment;
- Commitment to development of relevant professional knowledge, skills, and abilities;
- Cheerful, flexible self-starter, with the ability to multitask and function well under stress
- Outgoing, and optimistic with well-developed interpersonal skills and problem-solving capabilities;
- Team player who can discern when to lead or follow;
- Ability to exercise discretion and good judgment with sensitive matters and information;
- Cultural competence and enthusiasm for working with a diverse and dynamic community;
- Ability to effectively negotiate in a way that supports the interests and mission of the School;
- Ability to resolve conflicts while maintaining the rights and human dignity of all parties;
- Knowledge, willingness, and ability to support the canons of the Episcopal Church.

Credentials and Expertise

- Bachelor's Degree in accounting, finance, business management, or related area
- 5 years minimum of senior-level experience creating or executing financial planning and management strategies;
- A copy of the academic diploma of highest achievement as well as copies of specialized credentials are required for the personnel file for those hired after 6/30/07.

Salary Range: \$160, 000 - 175, 000

To Apply

A cover letter expressing interest in the position of Chief Finance and Operations Officer at Trinity School along with a current resume to:

Contact:

Matt Allio, Head of School

mallio@trinity-mp.org

Trinity School is an equal opportunity employer. Trinity School is committed to cultivating and sustaining a community that embraces difference and welcomes candidates who will add to the racial and cultural diversity of the Trinity School community.