

# DIRECTOR OF FINANCE AND OPERATIONS SEARCH

## BROOKLYN FRIENDS SCHOOL

Brooklyn, New York  
[brooklynfriends.org](http://brooklynfriends.org)

Start Date: July 1, 2024



**Carney  
Sandoe**  
& ASSOCIATES

[CARNEYSANDOE.COM](http://CARNEYSANDOE.COM)

# Mission Statement

Guided by the Quaker belief that there is a Divine Light in everyone, Brooklyn Friends School cultivates an intellectually ambitious and diverse community that celebrates each individual's gifts. We challenge our students to value and embrace difference as they develop critical thinking skills and apply their knowledge and intelligence both in and out of the classroom. In this rich learning environment, we inspire all members of our community to voice their convictions, to discover and pursue their passions, and to seek truth. Our graduates are compassionate, curious, and confident global citizens who let their lives speak in the spirit of leadership and service.

## At a Glance



Established  
**1867**



Enrollment  
**690**



Total faculty and staff  
("Colleagues" at BFS)  
**206**



Student-faculty ratio  
**7:1**



Students of color  
**39%**



Financial aid awarded  
**\$6.7M**



Head Teachers with  
advanced degrees  
**85%**



Campus size  
**2 campuses**  
in Downtown Brooklyn

Colleagues of Color: 98 (48% at time of  
DASL Reporting in 23-24SY)

Students receiving aid: 26%

Endowment: \$13M

Annual operating budget: \$32M

Sports teams: 30



## Overview

Brooklyn Friends School (BFS), a thriving PreK-12 Quaker school located in vibrant Downtown Brooklyn, seeks a visionary leader to serve as Director of Finance and Operations (DFO) to guide a vibrant community of eager-to-learn 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 its action-oriented collective work. The school's history has been illustrious and reflective of the expansive nature of human experiences. Guided by its 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, BFS affirms 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 the school's contemporary experience.

## Opportunities and Challenges

With immensely talented colleagues, committed families, a meaningful curricular program, and a community that believes in a values-actionable educational experience, Brooklyn Friends is in a uniquely positive position, with a deeply-rooted Quaker identity and mission combined with a genuine openness to the possibilities that lie ahead.

The next Director of Finance and Operations will embrace this time of possibility at BFS as a trusted strategic and critical thought partner to the Head of School and Board of Trustees through leadership and oversight of the financial health of Brooklyn Friends School.



In March of 2024, BFS finalized the purchase of 383-393 Pearl St. which is adjacent to the current Pearl St. campus. The acquisition signifies a momentous step in creating a [unified campus](#). The DFO will have the incredible opportunity to be integrally involved in collaboration with senior leadership on and project management of the creation of this newly acquired physical space.

As a school guided by Quaker values of Simplicity, Peace, Integrity, Community, Equality, and Stewardship the Leader will understand and be anchored in Quaker values. The DFO will also understand the critical role of financial sustainability as one of the key levers a community relies on to live its mission. In addition to overseeing the finance department and managing the operating budget and school investments, the DFO will demonstrate:

- **Partnership:** As an all-school role, an ability to joyfully work with children and adults alike is paramount;
- **Versatility:** Quickly shifting from ground level to 30,000 feet, the leader thrives in a high-energy and service-oriented environment;
- **Strategy:** A strategic partner to the most senior leaders, the DFO will be a key role in operationalizing the Strategic Vision; and
- **Innovation:** Modernize and upgrade essential business operations and functions for financial health & mission alignment

## Responsibilities

- Reporting to the Head of School and working closely with the Treasurer of the Board of Trustees, the DFO 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 DFO 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 and core values.
- The DFO will utilize financial modeling, analytics, forecasting, metrics, and benchmarking to provide vital information and decision support to the school’s Leadership and Trustees.
- The 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, 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.
- Serving as liaison to and trusted partner of the Trustee Finance Committee, the DFO will work closely with the Head of School and relevant Committee chairs (called “Clerks” at BFS) and provide timely and accurate meeting materials and support as appropriate.
- The DFO 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 DFO 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.

The DFO will also be responsible for the following:

### **Finance**

- 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;
- 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;
- Establish work objectives, priorities, and responsibilities to ensure efficient and effective operations of the Finance Office;



- 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;
- Develop in-depth financial/management reporting and related analysis for the Head of School and for presentation to the Board and relevant Committees;
- Develop, maintain and execute financial and accounting policies and procedures; ensure that all necessary internal controls are in place and working effectively;
- Foster banking relationships and oversee financial obligations to provide maximum benefit to the school's financial objectives;
- The DFO will also oversee the administration of the school's endowment, executing its investment policy, implementing decisions of the Investment Committee, coordinating with endowment consultants, investment managers and custodians, and ensuring effective endowment allocations, performance management, and reporting;
- Lead the school's risk management efforts; maintain adequate cost-effective levels of coverage to protect property and for liability;
- Ensure that the necessary systems, processes, technology, and controls are in place to carry out all financial and human resource functions of the school;
- 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;
- Serve as a member of the Tuition Assistance Committee;
- Partner closely with Director of Advancement and Director of Enrollment Management on all capital campaigns and tuition initiatives.

## **Human Resources**

- 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;
- 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;
- Work with the Director of HR to 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 current;
- Ensure that employment practices comply with all applicable employment laws and regulations;
- 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;
- Work closely with school leadership to administer collective bargaining agreement and meet responsibilities defined by it.



## Operations

- Oversee the management of all aspects of operations, including facilities and maintenance, security, health, and food services;
- 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;
- Work with the Director of Facilities to ensure compliance with all required environmental, health and maintenance standards and local, state, and federal regulations;
- Oversee school security; approve school safety and evacuation plans and procedures;
- Establish overall property, plant and equipment capital expenditure strategy and priorities for buildings maintenance; develop a 10-year plan for replacements, renewal, and improvements;
- Propose and obtain Board of Trustees approval for all major expenditures;
- Review and approve bid proposals and selection of contractors; ensure compliance with contractual agreements and budget restrictions;
- 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;
- Negotiate contracts with outside vendors, including for health and food services.

## Information Technology

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



## Qualifications and Personal Attributes

- 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.

# Learn More

Click on the links below to learn more about Brooklyn Friends School.

[School Website](#)

[Diversity, Equity, and Belonging](#)

[School History](#)

[School Profile](#)

[Core Values](#)

[About Brooklyn, New York](#)

[Strategic Vision](#)



## 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:

### **Elyse Waterhouse**

Consultant

[elyse.waterhouse@carneysandoe.com](mailto:elyse.waterhouse@carneysandoe.com)

### **Todd Gochman**

Consultant

[todd.gochman@carneysandoe.com](mailto:todd.gochman@carneysandoe.com)

### **Darryl Ford, Ph.D.**

Vice President, Education Leadership Services

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*The full-time equivalent salary range for this position is \$299,463 to \$320,311. The starting salary is based upon, but not limited to, several factors that include years of experience, education level, and expertise.*