

INTERIM CHIEF FINANCIAL OFFICER SEARCH

BERKELEY HALL SCHOOL

Los Angeles, California
berkeleyhall.org

Start Date: September 2024



BERKELEY HALL
SCHOOL



Carney
Sandoe
& ASSOCIATES

CARNEYSANDOE.COM

Mission Statement

To empower children to fulfill their unlimited, God-given potential as fearless scholars and conscientious citizens.

At a Glance



Established
1911



Enrollment
230



Faculty
36



Student-faculty ratio
8:1



Students of color
56%



Financial aid awarded
\$1.6M



Faculty with advanced degrees
42%



Campus size
66 acres
in the Santa Monica
Mountains

Faculty of color: 34%

Students receiving aid: 22%

Endowment: \$6M

Annual operating budget: \$9M

Sports teams: 30+

Science labs: 2

Student/computer ratio: 1:1



Overview

Located in Los Angeles, Berkeley Hall School is a private, coeducational school serving 280 students in preschool through grade 8. Rigorous academics in a supportive atmosphere and grounded character development allow students to become fearless scholars and conscientious citizens, gain a love of learning, leadership with social responsibility, creativity with moral integrity, and self-esteem with compassion for others and the environment. The school is nestled on 66 acres of natural beauty in the Santa Monica Mountains, which contributes to the appeal of this opportunity.

Founded in 1911, Berkeley Hall is the oldest coeducational independent school in Los Angeles. BHS is a non-religious school guided by a strong connection to its founding values. Its commitment to education is rooted in the vision of the school's founders, Leila and Mabel Cooper, who as educators were dedicated to promoting the unlimited, intelligent nature of all children as expressions of God.

The School seeks an experienced mission-aligned professional to serve as the Interim Chief Financial Officer (CFO), overseeing all aspects of its financial profile. Reporting directly to Head of School Dr. Sarah Colmaire, the CFO participates in Administrative Team meetings and in Board of Trustee meetings as a non-voting member. Compelling candidates will possess demonstrated financial acumen, the capacity to lead, mentor, and support teams, and high emotional intelligence. Ideal candidates will have experience in small non-profit organizations. This is a terrific opportunity to join a program with smart and thoughtful colleagues, a strong financial foundation, and a supportive, diverse community in which all backgrounds are welcome.



Opportunities and Challenges

Given the accelerated retirement of the current CFO, there is a desire for maintaining stability in the Business Office. The interim will be able to partner with Dr. Sarah Colmaire, an innovative Head of School in her second year of headship, and a highly functioning administrative team. The opportunities for leadership include creating a sense of unity in mission and purpose among the Business Office team; collaborating with other departments and members of the Administrative Team; and being visible in the school community.

BHS has two upcoming donor-funded construction projects that are currently in the permitting and design phases – Campus House, potentially a house for Head of School and/or development venue and temporary faculty/visitor housing, and – Innovation Lab II, the development of outdoor accessible teaching and learning space connected to the existing Innovation Lab. This position is the liaison for the Finance Committee to BHS’ investment management team and coordinates updates, investment strategy and liquidity requirements of the \$18 million portfolio which includes \$6 million of endowment funds for general operations and tuition assistance.



Responsibilities

In addition to embracing Berkeley Hall’s mission, supporting its Head and leadership, and representing the school at professional and public forums, the Interim CFO is responsible for leadership and oversight of the School’s financial operation and sustainability. The position comprises a number of primary responsibilities:

- Provide strategic leadership, analysis, and management of finances and operations.
- Establish financial and capital strategies that are consistent with the School’s strategic priorities.
- Serve on the Head of School’s Administrative Team and lead, co-lead, or participate in several other teams and committees.
- Oversee all business office functions including all financial reporting to the Head of School, Board of Trustees, and various committees.
- Serve as chief staff liaison to Board committees.
- Maintain the school’s short- and long-term strategic financial models.
- Oversee the administration of the school’s endowment.
- Maintain strong relationships with banks and lenders to ensure that funding is secured for the needs of the school and compliance with loan terms.
- Provide oversight responsibility and direction for institutional risk management, contractual, and legal matters and policies.
- Manage insurance programs including property, casualty, medical, workers’ compensation.
- Ensure compliance with all local and state reporting requirements.
- Collaborate effectively with Advancement, Enrollment Management, Human Resources, Technology, Auxiliary Programs, and other departments.
- Participate in diversity, equity, inclusion, and belonging professional development.
- Coordinate closely with the Director of Campus Operations on oversight of the physical plant, grounds, and construction functions.



Qualifications and Personal Attributes

- Bachelor's degree in business or accounting required, MBA or CPA preferred;
- Minimum of 7 years of senior-level experience in accounting or financial management role, or equivalent combination of experience and education (required);
- Experience in non-profit fund accounting; public accounting; independent schools (preferred);
- Experience in payroll procedures. Knowledge of business and not-for-profit accounting policies, procedures, practices, facilities, and software programs. Working knowledge of Blackbaud Financial Edge software (preferred);
- Excellent written and verbal communication skills. Ability to thoughtfully and effectively communicate with colleagues, students, parents, and teachers;
- Ability to maintain effective working relationships; fosters a collaborative environment;
- Ability to give and receive feedback effectively and efficiently;
- Ability to move through uncertainty with grace and balance;
- Experience on senior administrative teams and working with non-profit Boards preferred);
- Demonstrated experience in the development of analysis for strategic decision-making, such as key cost drivers, competitive analysis, market analysis, organizational strengths, and weaknesses, etc.;
- Excellent organizational and time management skills;
- Demonstrates problem-solving skills and is a self-starter;
- Aptitude for high customer-service standards;
- Commitment to BHS diversity, equity, inclusion, and belonging initiatives;
- Leadership philosophy in harmony with the teachings of Christian Science, through an alignment with the School's mission and core values;
- A track record of strong integrity;
- Ability to provide proof of COVID vaccination (or exemption);
- Live Scan and TB clearance.

Learn More

Click on the links below to learn more about Berkeley Hall School.

[School Website](#)

[Diversity, Equity, Inclusion, and Belonging](#)

[School History](#)

[High School Placement](#)

[Virtual Tour](#)

[About Los Angeles, California](#)



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:

Cathy Shelburne

Consultant and Executive Coach
cathy.shelburne@carneysandoe.com

Scott Nelson

Senior Consultant
scott.nelson@carneysandoe.com

The full-time equivalent salary range for this position is \$175,000-205,000. The starting salary is based upon, but not limited to, several factors that include years of experience, education level, and expertise.