

CHIEF FINANCIAL OFFICER SEARCH

TRINITY VALLEY SCHOOL

Fort Worth, Texas

tv.s.org

Start Date: July 2025



**Carney
Sandoe**
& ASSOCIATES

CARNEYSANDOE.COM

MISSION

Trinity Valley School has four main objectives for its students: Fine scholarship with its fulfillment at college; the development of wide constructive interests; intelligent citizenship; and spiritual and moral development which promotes lasting values.

AT A GLANCE



Established
1959



Total enrollment
1,021



Total faculty and staff
180



Student-teacher ratio
11:1



Students of color
24%



Financial aid awarded
\$2.7M



Faculty with advanced degrees
43%



Campus Size
75 acres

Zip codes represented: 55

Students receiving aid: 17%

Endowment: \$51.9M

Annual operating budget: \$29M

Sports: 23

Mascot: Trojan

Motto: *Per Aspera ad Astra* (Through
Difficulty to the Stars)



Overview

Founded in 1959 and named for the Trinity River that flows nearby, Trinity Valley School (TVS) is a premier co-educational independent school serving more than 1,000 students PK-12 on a 75-acre campus in Fort Worth, Texas. TVS provides extraordinary opportunities for students to develop empathy and inclusivity as leaders and to stretch themselves in academics, athletics, visual and performing arts, and signature programs in outdoor experiential education and global education. In addition to its comprehensive programs, families choose TVS for its deep commitment to developing curious minds and lifelong learners, as well as for its strong sense of community.

To deliver its excellent programs, TVS recruits and retains exemplary faculty whose skill in the classroom is complemented by their positive contributions to other programs and endeavors within the school community. These stellar faculty inspire excellence and actively promote the mission and philosophy of the school by modeling for their students the resiliency, flexibility and persistence that embody the TVS school motto, *Per Aspera ad Astra* (Through Difficulty to the Stars!).

Trinity Valley School is committed to attracting and retaining exceptional faculty and staff by offering highly competitive salaries; fully paid employee health, disability, and life insurance; dental insurance; TIAA-CREF 403(b) plan with immediate vesting; vision insurance; flexible spending accounts; ample funding for professional development; tuition reimbursement for coursework toward advanced degrees; and more.

TVS seeks a full-time Chief Financial Officer to join TVS on or before July 1, 2025. As a direct report to the Head of School and member of the senior administrative team, the CFO will play a key leadership role in charting the school's strategic future and assuring its fiscal strength. A major attraction for the next CFO will be the opportunity to partner with the school's new Head of School, Ben Courchesne, whose tenure also begins officially on July 1, 2025.



Opportunities and Challenges

- Be a strategic thought partner with the new Head of School, focusing on short-term and long-term issues and planning.
- Serve as the school's liaison to various committees of a strong Board of Trustees by providing regular financial monitoring, budget updates, and budget projections to the Board's Finance, Endowment, and Buildings and Grounds committees.
- Participate on the Senior Administrative Team, working collaboratively and communicating effectively with all members of this Team, several of whom are relatively new to their positions.
- With full enrollment putting pressure on campus space, support the development of the next campus master plan, including renovation of the Upper School, and provide financial input for the planning of the next capital campaign that will help to fund new projects.
- Effectively manage the school's finances with a focus on thoughtfully balancing and allocating resources to meet the competing needs and priorities of different areas of the school.
- Work very closely with Operations and Human Resources and help plan the future evolution of these responsibilities relative to the Business Office.

Responsibilities

The Chief Financial Officer (CFO) is a vital member of the TVS Leadership team, working closely with the Head of School and the Finance Committee to ensure the financial health and sustainability of the school. This role encompasses not only the development and management of the school's operating budget and endowment, but also the oversight of all business office operations, financial planning, compliance, and risk management. The CFO plays a key role in shaping and supporting the school's strategic vision, fostering a culture of collaboration, transparency, and accountability. Key responsibilities include:

- Manage the school's operating budget and long-range financial plan.
- Supervise the Business Office Staff to ensure appropriate financial controls and to produce clear financial reports for the Head of School and the Board of Trustees.



- Oversee all banking and debt-related relationships while managing the school's long-term borrowing objectives, including negotiating, structuring, implementing, and monitoring of loan agreements. The school currently has no debt.
- Lead the preparation and review of financial reports, including timely filings of tax returns, coordination of annual financial audits, and adherence to legal and regulatory requirements.
- Manage the annual review and renewal of insurance policies, including general liability, property, casualty, and workers' compensation, ensuring comprehensive coverage and risk mitigation.
- Serve as a key member of the Finance Committee, Endowment Committee, Audit Committee, Buildings and Grounds Committee, providing insightful analysis and recommendations that support the school's strategic goals.
- Be responsible for working with the Administrative Team on the collection, completion and analysis of varying data surveys, audits, and other sources to drive informed strategic decisions.
- Identify and implement new systems, technologies, and workflows to enhance efficiency, accuracy, and productivity within the business office.
- Represent TVS in professional organizations, conferences, and workshops, staying abreast of industry trends and innovations.
- Oversee all legal issues and other counsel relationships. Keep abreast of existing and pending legislation that may affect the school.
- Collaborate with the Head of School and the Advancement Department to support fundraising initiatives, aligning financial strategies with development efforts.
- Collaborate with the Admissions Department to assist with the financial aid process, ensuring fairness, transparency, and accessibility which are defined by the organizational financial guardrails such as discount rate and enrollment goals.
- With the Head of School and Board of Trustees, develop a comprehensive financial plan, including capital needs of the school for three to five years, and update it yearly. Monitor and project the cash flow.



Qualifications and Personal Attributes

- Bachelor's degree required; MBA, CPA, or equivalent advanced degree preferred.
- 5-10 years of senior-level financial management experience, with a proven record of developing and executing financial strategies in a dynamic environment. Experience in independent schools is a plus.
- Familiarity with Blackbaud NXT preferred.
- Familiarity with nonprofit accounting standards, fundraising systems, and best practices, particularly in educational institutions.
- Skilled at negotiating contracts and managing relationships with external vendors to optimize services and costs.
- Experience with a capital campaign and capital build out.
- Demonstrated experience in financial planning, budgeting, and analysis that supports strategic decision-making. Ability to think both creatively and analytically, considering key cost drivers and organizational strengths and weaknesses.
- Experience working with senior leadership teams and nonprofit Boards, with a commitment to fostering strong, collaborative relationships.
- Strong leadership abilities with superb written, verbal, and presentation skills. Adept at translating complex financial data into clear, actionable insights for various stakeholders.
- Ability to collaborate, adapt, and be effective under pressure, demonstrating flexibility and a solutions-oriented mindset in challenging situations.
- A proactive, innovative leader who seeks opportunities for improvement and growth.
- Fully support the four main objectives of the [TVS Mission Statement](#).
- Recognize, embrace, and advance TVS's values and a shared commitment to building an inclusive and welcoming community for all.
- Demonstrate the ability to maintain focus and adaptability in the face of frequent interruptions, shifting priorities, and dynamic situations.
- Foster a collaborative, team-oriented environment that encourages interaction and cooperation among year-round and seasonal staff, as well as across departments.
- Availability for occasional prolonged or irregular hours, as needed to meet the demands of the position and support the school community.
- Adhere to strict confidentiality guidelines, particularly in handling sensitive financial, personal, and organizational information.
- Communicate effectively with a variety of stakeholders, including colleagues, students, families, and external partners, fostering positive relationships and clear understanding.
- Availability for occasional prolonged or irregular hours, as needed to meet the demands of the position and support the school community.
- High degree of integrity, ethical behavior, emotional intelligence, and a relational approach.

Learn More

Click on the links below to learn more about Trinity Valley School.

[School Website](#)

[Academic Profile](#)

[School History](#)

[About Fort Worth, Texas](#)

[Virtual Campus Tour](#)



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 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:

Mark Davis

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