

CHIEF FINANCIAL OFFICER SEARCH

VISITATION ACADEMY

St. Louis, Missouri

visitationacademy.org

Start Date: July 2025



**Carney
Sandoe**
& ASSOCIATES

CARNEYSANDOE.COM

Mission Statement

Visitation Academy is a community that exists to educate children and young women and to receive and share Jesus as Mary did in her visitation to Elizabeth.

In an environment which values excellence in scholarship, spirituality, leadership, and service, this Visitation Community encourages students to develop their unique gifts.

As students learn to “Live Jesus” with gentleness, humility, joy, and freedom, they are prepared to continue to grow and to respond to others, the Church, and the global community.

At a Glance



Established
1833



Enrollment
624



Total faculty
91



Student-faculty ratio
7:1



Students of color
15%



Financial aid awarded
\$1.6M



Faculty with advanced degrees
66%



Campus size
30 acres

Upper School enrollment: 280

Middle School enrollment: 180

Lower School enrollment: 164

Percentage of non-Catholic students: 20%

Zip codes represented: 72

Faculty of color: 3%

Average class size: 15

Students receiving aid: 22%

Endowment: \$28M

Annual operating budget: \$15M

AP courses: 14

Clubs and organizations: 50+

State championships: 24

School motto: Live Jesus



Overview

Visitation Academy is an independent all-girls Catholic school for students in grades 1-12 with a coeducational Montessori preschool program serving children from age 2 through Kindergarten. The school began in 1833 when Bishop Joseph Rosati invited the Sisters of the Visitation to open a school for young women in the St. Louis Diocese. The school, which has changed locations throughout its history, moved to its current location in 1962. *“From its origin and throughout its various locations, one thing has remained constant – the Sisters faithful commitment to their mission to receive and share Jesus, just as Mary did in her visitation to Elizabeth.”*

“The Sisters have lovingly and selflessly dedicated themselves to the educational and spiritual formation of thousands of children and young women through the years. To this day, the Sisters continue to be a welcome and nurturing presence on the Viz campus, participating in prayer, daily activities, and exchanging words of affirmation and motivation with students.”

Today, the Visitation Academy is divided into three divisions: Lower School (Preschool – Grade 5), Middle School (Grades 6-8) and Upper School (Grades 9-12). With a total enrollment of 624 and an Upper School of 280, the school is known for its small classes and all-girls Lower division, which is unique in the area. The school’s rigorous academics include a robust Science program, STEM and engineering classes, project-based learning, Advanced Placement courses, and St. Louis University’s 1818 college credit program. Facilities encompass 200,000 square feet on the 30-acre campus, and the school is in the process of renovating and re-purposing certain facilities as part of a campus master plan.

From the Preschool Montessori program through the Upper School, “Be Who You Are and Be That Well” drives Visitation Academy’s academic and spiritual philosophy. As the school states, Visitation Academy is *“a private Catholic school where students thrive in an environment that allows them to BE: challenged academically, stimulated creatively, encouraged athletically, inspired personally, supported emotionally, filled spiritually, and appreciated and loved for their unique, authentic selves.”*



Visitation Academy seeks a seasoned, thoughtful, and dedicated professional to serve as the school's next Chief Financial Officer (CFO). Reporting to Head of School, David Colón, this individual is responsible for all aspects of the school's finances, oversees the Director of Operations, and serves as a strategic thought partner for the Head of School, Senior Administrative Team, and Board of Trustees. The new CFO will lead a talented, experienced Business Office team. As Visitation Academy seeks to continue to thrive in a highly competitive market, the new CFO will have opportunities for innovative thinking, creative problem solving, and input to help shape an exciting future for the school.

Opportunities and Challenges

Opportunities

- Be a strategic thought partner with the 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/Investment and Buildings, Grounds, & Technology committees.
- Participate on the Senior Administrative Team, working collaboratively and communicating effectively with all members of this Team.
- Help develop annual budgets and produce clear budget updates on a regular basis for all departments throughout the school.
- Have a major impact on the school's future by taking a highly functioning Business Office to the next level by focusing on prudent financial management, long-term financial planning and modeling, streamlined operations, more efficient systems, and updated monitoring and planning of campus facilities.
- Be an integral part of a very inspiring school community that is mission-focused and aligned around common values and goals.



Challenges

- Effectively manage the Academy's finances with a focus on strategic modeling that is flexible and adaptable to a competitive independent school market.
- Establish collaborative relationships with all members of the Senior Administrative Team.
- Assess and update financial systems to improve reporting efficiency and transparency and streamline processes for all parties who rely on this financial information.
- Diplomatically communicate the need for any new financial systems and processes and thoughtfully manage the plan for implementing these new systems and processes.
- Seek creative, innovative approaches to employee benefits to reward faculty and staff and help retain talent.

Responsibilities

In addition to embracing Visitation Academy's mission, supporting its Head and leadership, and representing the school at professional and public forums, the new CFO will have a number of primary responsibilities:

- Provide strategic leadership, analysis, and management of finances and operations.
- Serve on the Head of School's Administrative Team and lead, co-lead, or participate on several other teams and committees.
- Collaborate effectively with Advancement, Enrollment Management, and other departments.
- Manage the day-to-day financial functions and all staff involved in accounting and financial activities of the Academy.
- Build and/or maintain the Academy's short-term and long-term financial models.
- Serve as chief staff liaison to several Board committees and take responsibility for the consistent application of all policies adopted by the Finance/Investment Committee and Board of Trustees.
- Oversee administration of the financial aid system with compassion.
- Develop and implement procedures to ensure timely, accurate and complete accounting for all transactions of the Academy.
- Ensure adequate retention of all accounting records, employee files, contracts and agreements and insurance records.



- Maintain a system of strong internal control.
- Prepare and monitor the Annual Operating Budget of the Academy.
- Provide accurate and timely financial reports to all administration, faculty and staff with budget management responsibility.
- Ensure timely deposit and accurate recording of all income and receipts of the Academy.
- Implement Investment Policies approved by the Board of Trustees.
- Approve payment of all financial obligations of the Academy; sign checks and approve all wire transfers.
- Manage the cash flow of the Academy including tracking account balances and investment administration.
- Prepare accurate and timely financial reports including, but not limited to investment performance, status of various monthly budgets, monthly statements of activity and financial position, interim reports as requested by the Treasurer, and interim reports as requested by the Head of School.
- Prepare Annual Financial Reports and Trial Balance for Audit.
- Oversee the annual independent audit of financial statements.
- Ensure reliability of computer network and data backup related to business and development applications.
- Administer risk management programs within the Academy to minimize or mitigate losses and ensure maximum insurance benefit in the event of incident or claim.
- Direct the Academy's salary administration and employee benefits programs, including health insurance, retirement, worker's compensation, life insurance, and other related plans.
- Ensure compliance with all local and state reporting requirements.
- Work with administrators, Director of Operations, and Buildings, Grounds & Technology Committee to plan for and budget for short-term and long-term facility needs.
- Coordinate closely with the Director of Operations on oversight of the physical plant, grounds, and construction projects.
- Oversee the Director of Operations who is responsible for facilities, cleaning, dining services, and security.

The Chief Financial Officer may delegate the duties related to these responsibilities to Academy employees (Business Office staff). From time-to-time, other employees or constituents may pursue activities that impact the financial management of the Academy. In these instances, the Chief Financial Officer shall oversee all activities and ensure the proper reflection of such transactions in the financial records of the Academy.



Qualifications and Personal Attributes

- Bachelor's degree required; Accounting degree or CPA strongly preferred;
- 5-10 years of senior-level experience creating and executing financial planning and management strategies;
- Experience in an independent school or other non-profit preferred, though individuals with strong financial and leadership skills will also be considered;
- Experience working collaboratively on senior administrative teams and working with non-profit Boards;
- Experience managing a team, setting goals, responsibilities, expectations, and clear methods of accountability;
- Proven record of accomplishment designing, managing, and diplomatically implementing organizational change;
- Clear, proactive communication and presentation skills;
- Demonstrated ability to distill complex financial topics and effectively communicate this information to varied audiences;
- An accessible, approachable style and a willingness to be a presence in the school community;
- Demonstrated experience in the development of analysis for strategic decision-making involving enrollment, tuition, salaries and benefits, and capital projects;
- Experience in human resource management, employee benefits programs (including retirement plans), and payroll procedures;
- Knowledge of business and not-for-profit accounting policies, procedures, practices, facilities, and software programs; Blackbaud experience a plus;
- Ability to think and plan strategically and creatively;
- Ability to remain calm and flexible under pressure and work effectively while supervising, managing, and delegating multiple functions and responsibilities;
- Skilled at negotiating and initiating contracts with external vendors;
- Aptitude for kindness and compassion when interacting with all members of the school community;
- A track record of strong integrity.

Learn More

Click on the links below to learn more about Visitation Academy.

[School Website](#)

[School Profile](#)

[School History](#)

[About St. Louis, Missouri](#)



To Apply

Interested and qualified candidates are invited to contact the consultant 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:

Scott Nelson

Senior Consultant

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