

CHIEF FINANCE & OPERATIONS OFFICER SEARCH

PRESIDIO KNOLLS SCHOOL

San Francisco, California

presidioknolls.org

Start Date: July 2023

普利西学校
PRESIDIO
KNOLLS
SCHOOL



**Carney
Sandoe**
& ASSOCIATES

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Mission Statement

To nurture the young heart and mind in a joyful learning environment, where the convergence of progressive education and Mandarin immersion ignites curiosity, connectedness, and engagement in the world.

At a Glance



Established
2008



Enrollment
396



Full-time Faculty
78



Annual Operating Budget
\$14.4 million



Campus Size
55,368 square feet
across 1.5 acres



Faculty with advanced degrees
60%



Overview

Presidio Knolls School (PKS) is a coed, PK-8, progressive Mandarin immersion school in the heart of San Francisco. Founded in 2008, the school has expanded in its first 15 years from just 35 students to almost 400 students. This significant and rapid growth has been intentionally and thoughtfully directed by the Head of the School and Board of Trustees, who have a common vision for the school, a shared sensibility for entrepreneurial thinking, and the united desire to identify the appropriate steady state for the school.

The history of PKS starts in 2008 with a two-room immersion preschool. Due to heavy demand, the school moved to its present location and added K-8 classes in 2012. In 2016 the school purchased its current property and by 2021 graduated its first 8th grade class. All this growth and change reflects a board that is comfortable with taking measured, yet bold, risks. This entrepreneurial mindset permeates all aspects of school life. At the same time, the school has matured significantly as an institution and is interested in continuing to establish best practices, systems and structures that reflect its current level of stability.

PKS is a school with high community morale, smart, passionate people, and bold and brave ideas about the future of education. The next Chief Finance & Operations Officer (CF&OO) will work closely with Head of School Chris Livaccari as a trusted partner on financial and operational matters, as well as broader school matters. Open communication, transparency, and collaboration will be key to supporting the Head's expertise in and comfort with the school's financial profile and strategy. Working with the Board of Trustees, the CF&OO will build a strong working relationship with dedicated colleagues committed to ambitious goals and open to innovative ideas that advance the school and its mission.



Opportunities and Challenges

Presidio Knolls has embraced a start-up ethos since its founding that has enabled rapid, steady growth and success during its tenure. The next Chief Finance & Operations Officer will contribute to the maturation of the school while it maintains that spirit of thinking boldly to advance its mission and support its students. The process will involve further professionalizing and unifying the school's systems, adding time tested best practices, and enhancing capabilities around budgeting, controls, forecasting, and financial aid.

The Head, Chris Livaccari, is eager for a thought partner to collaborate on schoolwide initiatives and the broader vision of the school, which will include the implementation of the strategic plan. The school, while still relatively young, is well past concerns about financial viability and now focusing on the next layer of services and processes that are the hallmark of great schools.

As the entrepreneurial board transitions from operational to strategic concerns, the new CF&OO will balance strategic plan implementation with attention to policies and procedures that will allow the school's professional community to flourish. The CF&OO will lead an experienced and dedicated business office that is eager for collaboration, communication, and professional development opportunities. The CF&OO will also partner with administrative leadership on the budget process and opportunities to pursue new programmatic initiatives.

In September 2022, PKS launched a five-year [strategic plan](#) looking ahead to the school's 20th anniversary in 2028. The CF&OO will be immersed in all aspects of honoring the plan's goals and will be charged to work closely with the board on initiatives relating to the school's aspirations for facilities, continued financial growth and stability, and increased community connections.



Responsibilities

- In close partnership with the Head of School, make strategic decisions that reflect the school's mission, vision, and core values;
- Provide strategic leadership and management of finance and operations;
- Maintain all proper financial controls and systems, and prepare annual budgets for approval by the Board;
- Maintain school grounds, resources, and property, including oversight of continued campus improvement and buildout;
- Collaborate closely with the school's Advancement Team on tuition assistance, annual enrollment contracts, and supporting strategic fundraising goals and appropriate recording and stewardship of gifts;
- Oversee the school's technological systems;
- Maintain and cultivate strong relationships with banks, lenders, and other financial partners;
- In close partnership with the Head of School, provide regular updates to the board, and work closely with the Board's Finance, Audit, and Master Planning Committees.



Qualifications and Personal Attributes

- Bachelor's degree required, MBA or CPA preferred;
- 10-15 years of senior-level experience creating and executing financial planning and management strategies;
- Superb communication skills; excellent written, verbal, and presentation skills;
- Excellent interpersonal and collaboration skills, and the ability to promote and sustain a positive school culture characterized by integrity, empathy, and kindness;
- Demonstrated ability to take complex subjects, distill them, and then communicate them to varied audiences;
- Experience in an independent school preferred though individuals with strong financial and leadership skills are welcome;
- Experience on senior administrative teams and working with non-profit boards;
- Excellent analytical skills and attention to detail;
- Demonstrated experience in measuring and improving organization-wide productivity;
- 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.;
- Experience in human resource management, employee benefits (including pension plans), and payroll procedures;
- Excellent knowledge of business and not-for-profit accounting policies, procedures, practices, and software programs;
- Ability to think and plan strategically and creatively;
- Ability to supervise, manage, and delegate multiple functions and activities;
- Ability to remain calm, flexible, and work effectively under pressure;
- Skilled at negotiating and initiating contracts with external vendors;
- Customer service oriented;
- An entrepreneurial mindset;
- Committed to equity and inclusion practices;
- Evident integrity.

Learn More

Click on the links below to learn more about Presidio Knolls School.

[School Website](#)

[Educational Philosophy](#)

[School Values and History](#)

[High School Matriculation](#)

[Diversity and Belonging](#)

[About San Francisco, 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:

Gregory G. Britton

Chief Operating Officer, Search & Consulting Group
ggb@carneysandoe.com

Sara Shulman

Search Consultant
sara.shulman@carneysandoe.com