



Brookwood School

Title: Director of Finance and Operations

Date: April 2017

Position Start Date: July 1, 2017

About Brookwood

Brookwood School was founded in 1956 and recently celebrated 60 years of excellence in elementary and middle school education. Serving approximately 370 students in grades Pre-Kindergarten through eighth grade, Brookwood provides an academically challenging education through a child-centered program focused on building 21st century skills and the values of conscience, character, compassion and cultural competence. With a strong sense of community and mission, Brookwood offers a collaborative work environment for more than 90 faculty and staff who go the extra mile to do what is best for children.

Position Summary

The Director of Finance and Operations oversees all aspects of the school's finances and operations with primary responsibilities of strategic financial planning, budgeting, accounting and reporting, and overseeing school operations. The position reports to the Head of School and serves as a key member of the senior leadership team and several Board of Trustees committees. The position works closely with the Head, trustees and the leadership team. The ideal candidate is a mission-driven strategic thinker who has superb people skills, uncompromising judgment and integrity, and a demonstrated commitment to equity and inclusion. The candidate will have the ability to balance and prioritize the competing needs of the school and be fair but firm when necessary.

The Campus

Brookwood is located 25 miles north of Boston on the coast in Manchester, MA on a beautiful 30-acre wooded campus. The physical plant includes a pond, wetland spaces, forest areas and open green space. The 130,000 square foot facility sits under one roof with construction ranging from the original 1900 stable (now housing grades 6-8) to the 2014 project of a state-of-the-art lower school, dining commons and kitchen. In addition to grade level classrooms, there are five outdoor classrooms, two music rooms, three art studios and a kiln room, four science labs and science gym, a library with a 15,000 volume collection, an Idea Lab, a gymnasium and a multi-purpose theater/gymnasium space, two synthetic turf fields, and well-appointed outdoor play spaces. The surrounding area of Cape Ann is filled with beautiful natural and historical attractions such as beaches, parks, preserves, museums and hiking trails that are used frequently by our students, employees and families alike.

Challenges and Opportunities

The next Director of Finance and Operations will oversee an operating budget of \$12 million supported by an endowment of \$12 million. Like most independent schools across the country, Brookwood finds itself facing the challenge of affordability, including pricing and financial aid pressures, for its current and future families. To that end, the Director of Finance and Operations will play an integral role in developing a strategic road map for the future of the school. Brookwood will begin a strategic planning process in the coming year and the Director will work closely with the Head of School, other senior administrators and the Board of Trustees in guiding the future direction of the school. This will also include assessing long-term capital needs identified in the strategic plan. In addition, as a key member of the senior administrative team, the new Director must forge strong relationships with the Head of School, Board members, and faculty and staff, and identify any gaps in service to the mission of the school.

Essential Duties and Responsibilities

- Manages, develops and directs the annual operating budget of \$12 million dollars. Plans and prepare forecasts of financial condition of the school. Reports to the Head of School, the Finance Committee, and the Board of Trustees on the results of the present operations of the school and pro forma projections for future operations.
- Establishes an effective financial modeling system for strategic planning to aid the administration and the Board of Trustees in making strategic decisions.
- Provides the financial information and planning that builds trust among faculty, administration, staff and Board of Trustees.
- Oversees the endowment, providing information on invested funds and implementing decisions of the Board Investment Committee.
- Manages and directs the day-to-day operation of the business office including payroll, accounts receivable, accounts payable, accounting, and school supply functions.
- Maintains compliance with governmental regulations and changing regulatory environment by staying current on law and regulations that may affect compliance.
- Establishes policies, procedures, standards and strategies for areas of responsibility and provides appropriate internal controls and strengths to safeguard the school's assets.
- Oversees the risk management function and purchase property, casualty, liability and workers compensation insurance.
- Manages human resources including employee relations, benefits and compensation, and safety for employees.
- Oversee and direct implementation and administration of employee benefit programs such as health insurance, dental insurance, disability insurance, life insurance, workers compensation, employee assistance, retirement and other related plans.
- Manages financial aid process, including preparation of materials, compilation of data for financial aid committee, record keeping, notification and follow up.
- Oversees the physical plant and grounds functions. Serve as liaison to the Head of School and Board of Trustees on all facilities planning initiatives. With the Director of Physical Plant, manages all construction projects on campus.
- Selects or approves and directly oversees relationships with business service providers

(e.g., banks, auditors, attorneys, insurers, investment managers, food service and transportation providers, contractors, consultants). Secures the highest level of quality products and services for the school's business functions, including measurements of cost effectiveness.

- Oversees the food service program and manages the relationship with the outside vendor providing the program.
- Manages transportation systems and contracts.
- Effectively supervises and mentors key professional staff, including the Controller, Manager of Benefits and Accounts, Director of Physical Plant, Director of Auxiliary Programs, Director of Food Service Contractor, and Receptionist.
- Completes other responsibilities as assigned by the Head of School.

Ideal Qualifications and Characteristics

- Bachelor's degree required; MBA preferred.
- 10+ years of financial and business leadership in a non-profit or for-profit organization(s) including work with non-profit boards; independent school experience a plus.
- Experienced strategic thinker who can develop a road map for the future.
- Demonstrated experience in the development of analysis for strategic decision-making, including key cost drivers, competitive analysis, market analysis, etc.
- Experience developing long-range capital and operational budget planning.
- Experience in strategic pricing to drive enrollment and meet market demand and expertise in optimizing financial aid.
- Experience in determining alternative revenue sources in a non-profit setting.
- Ability to lead strategic initiatives to completion while anticipating issues and identifying effective solutions across the school.
- Experience in human resource management, employee benefits and payroll procedures.
- Demonstrated experience in measuring and improving organization-wide productivity.
- Effective collaboration skills, consistent meaningful contribution to senior leadership teams, and a focus on process as well as outcome.
- Exceptional written/verbal communication and presentation skills, including the ability to distill complex topics and then communicate them effectively to varied audiences.

To Apply

Interested and qualified candidates should email a cover letter, résumé and list of five references with contact information to Cathy Marrero, Executive Assistant to the Head of School (cmarrero@brookwood.edu).