ST. FRANCIS EPISCOPAL SCHOOL
Houston, Texas

CHIEF FINANCIAL OFFICER
Start Date: Summer 2021
StFrancisHouston.org
Mission

In the Anglican tradition, St. Francis Episcopal School challenges and motivates students in an academically and spiritually stimulating environment to become imaginative, critical thinkers and people for others.

OVERVIEW

St. Francis Episcopal School in Houston is a primary through high school co-educational day school known for its supportive culture and intellectually rich, forward-thinking programs. Serving 878 students of all backgrounds, the school offers an innovative curriculum and a faith-based program designed to help its students develop a strong sense of identity, the skills for college and life, and a commitment to the greater good. From its Reggio-inspired approach in Primary School to the student-centered STEAM and design-thinking programs in the Upper School, all divisions use research-based pedagogical approaches to engage student learning on a deep level.

Through a well-orchestrated plan, St. Francis Episcopal School has been growing recently from a Pre-Primary through grade 8 school into a Pre-Primary through grade 12 school — adding a grade level to the Upper School each year since it opened in 2018. As the newest division, the Upper School has been thoughtfully developed as a leading-edge program based on both the school’s mission and the growing body of knowledge and research in the science of learning. The 2021—22 will be the first academic year with all four high-school grade levels and the first graduating senior class in the history of the school.

St. Francis Episcopal School seeks a Chief Financial Officer starting in the summer of 2021. The CFO will join the school’s Executive Team to oversee all financial operations at the school which is in the midst of enrollment growth and expansion of facilities. The duties of the CFO require working directly with the Head of School, fellow administrators, and the Board to develop and execute the overall financial strategy for the school as it deals with all the moving parts of its growth, expansion, and operation.
SCHOOL HISTORY

From a single preschool class in 1952, St. Francis Episcopal School gradually expanded into a full elementary school. By 1973, St. Francis included classes through sixth grade. Between 1978 and 1985, capital campaigns funded the construction of a gymnasium, dining hall, additional classrooms, and the Sarah W. Woolrich Education Building. In 1997, the school added an Outdoor Activity Center and in 2001 opened a new Lower School Building, library, a 600-seat Fine Arts Center, and technology center, along with a renovated dining hall, gymnasium, and common area. The Woods Outdoor Classroom was added in 2011.

With the Pre-K–8 school fully developed, St. Francis began expanding again in 2017 — this time to establish a forward-thinking Upper School division. Since opening the Upper School division in August 2018, the school has added a high-school grade each year. In 2021-22, the Upper School will serve ninth through twelfth grade.

THE SCHOOL

St. Francis Episcopal School is the parish school of St. Francis Episcopal Church in Houston, TX. Located on two campuses within a mile of each other, the school currently educates 878 boys and girls from Pre-Primary through eleventh grade. In 2021–22, the school will also include grade 12. The entire Upper School is housed in a combination of buildings on the 23-acre Couper Campus.

Guided by the school’s four cornerstones — “Faith, Dignity, Courage, Scholarship” — students advance through critical stages in the development of language, social skills, and problem-solving capabilities. They build study habits, self-discipline, and strengths in abstract thinking, and develop values that will help them grow into poised, confident leaders.
The recently approved strategic plan, St. Francis 2025, is designed to strengthen the overall St. Francis experience. Areas of focus include evaluating and improving programs; devoting resources to recruiting and hiring highly talented faculty; working to diversify the community; partnering with parents in their children’s academic journey, and stewarding and expanding financial resources for the school's future. Another major element of the plan is the completion of the Upper School division. To that end, St. Francis School is currently constructing state-of-the-art Upper School facilities to house 220+ students.

St. Francis Episcopal School is accredited by and a member of the Independent Schools Association of the Southwest and the Southwest Association of Episcopal Schools.

ACADEMICS

The preschool through grade 12 program guides students from the first stirrings of independence and cooperation in Primary School into the academic refinement and self-awareness of Upper School—all while encouraging a heart for others that will see them well into their adult years. Drawing from its legacy of success, St. Francis Episcopal School offers dynamic learning opportunities to ensure young visionaries of different faiths, experiences, and backgrounds are encouraged to push the boundaries of what’s possible.

In the classroom, St. Francis students enjoy a rigorous curriculum taught by distinguished faculty focused on experiential learning, mastery of skill, and character development in a faith-based setting. With robust creative arts, athletics, and community service programs, learning extends far beyond the classroom.
In Primary School, passionate teachers understand that children are naturally curious and provide rich opportunities for them to explore, investigate, ask questions, and take safe risks as they wonder and learn about their world. Based on a Reggio Emilia-inspired, project-based approach, “the environment is the third teacher.” Through constructive play, the environment is pivotal in supporting children’s cognitive, social, emotional, physical, and spiritual growth and development.

Lower School students discover a lively center of learning infused with the joy and excitement of discovery. Through an academically enriched, rigorous curriculum, students in kindergarten through grade 4 build on the academic, social-emotional, physical, and spiritual groundwork established by the Primary School program. Here, a student-centered, inquiry-based education encourages critical thinking, problem solving, respect for others, and collaborative work.

The Middle School builds on the foundations laid in the Primary and Lower Schools to ensure development of the whole child. As Middle School is a time of significant personal and academic growth, faculty supports students in their quest for independence by encouraging increased responsibility and setting high expectations.

The Upper School learning environment combines intensive, interdisciplinary coursework with increasing autonomy to create a college-like experience—empowering students to hone their talents and interests while exploring new possibilities. Signature programs include entrepreneurship, internships, and two-week intensives that provide practical and real-world experience.

By graduation, a St. Francis education will have fostered an intense intellectual curiosity, a deep affinity for others, and a desire to gain an understanding beyond the student’s own lived experience. St. Francis offers a comprehensive college counseling program to guide students in their post-graduation endeavors. As early as freshman year, students begin working with the Department of College Counseling to build self-awareness and develop the research skills needed to make choices that will benefit them well beyond their high school years.
The well-developed art, music, and drama programs stimulate creative thinking, nurture self-confidence, and enhance leadership skills and academic performance. Students also develop discipline, perseverance, and commitment as they prepare for gallery shows or rehearse for various musical and theatrical productions that take place in the state-of-the-art Fine Arts Center. The fine arts program includes a variety of courses as well as a range of theatrical and musical opportunities.

St. Francis Middle School offers a comprehensive athletics program with fall, winter, and spring sports seasons. Students in grades 6-8 have the opportunity to participate on teams and compete against other schools throughout the year. While participation is optional, more than 90 percent of students tend to participate in at least one sport each year. Students who are not on a team are enrolled in a physical education class. St. Francis is a member of the Houston Junior Preparatory Conference (HJPC), which comprises K-8 and K-12 schools from the Houston area. The Middle School has won 29 HJPC championships.

Upper School athletics began in the fall of 2018 with the Founding Freshman class. The Wolves have competed independently in the following sports: boys’ and girls’ volleyball, co-ed cross country, boys’ and girls’ basketball, co-ed swimming, baseball, softball, co-ed track and field, co-ed golf, and co-ed tennis. Approximately 80% of Upper School students participate in at least one sport. As the Upper School continues to grow, the school anticipates adding sports offerings similar to those in the Middle School program.
STUDENT LIFE

At the heart of every student-life effort is the goal of cultivating an awareness of human needs and differences, developing in each student a moral sense of “giving back,” encouraging a personal pattern of service, and fostering a belief that change for the better is possible through individual and group efforts.

As people for others, students in all divisions have worked together to collect food, toys, and coats for families in need; hand-deliver school supplies to students in Costa Rica; raise funds for eye exams for disadvantaged children; create pottery bowls to benefit the Houston Food Bank; tie-dye pillowcases and make care packages for patients at Texas Children’s Hospital; write letters of support to our military troops and veterans; and even raise enough funds for the creation of a life-saving water well in a remote village in South Sudan!

Separately, the St. Francis Travel Program offers Middle and Upper School students the opportunity to broaden their horizons through carefully curated learning adventures. Primary II through eleventh grade students gain a deeper understanding of a variety of subjects through class trips, cultural enrichment, field trips, and participation in the Outdoor Learning Experiences (OLE) program. OLEs enrich curriculum study with extensive opportunities for critical thinking, problem solving, and captivating primary-source learning, all while forging unforgettable lifetime memories.
CAMPUS

St. Francis Episcopal School is located on two sites totaling 39 wooded acres in Houston’s Memorial area. The 16-acre Piney Point Campus serves students in grades K-8, and features meticulously groomed regulation playing fields, a state-of-the-art Fine Arts Center, a certified Nature Explore outdoor classroom, a gymnasium and covered outdoor activities center, and a library totaling more than 7,000 square feet.

The gorgeous 23-acre Couper Campus is located just a mile from the Piney Point Campus, and houses the Primary School in three cottages, athletics fields, the Crum Athletics Center, and all Upper School facilities. A new student life building is currently under construction. This state-of-the-art, 36,000 square-feet facility will accommodate the growing Upper School. With the other facilities on campus, the Upper School will have the ability to serve 220+ students.

HOUSTON, TEXAS

With an estimated population of 2.3 million people, Houston is the most populous city in Texas and the fourth largest in the United States. Located near Galveston Bay, Houston is a highly diverse city with a large and growing international community. The Rice University Kinder Institute for Urban Research has described Greater Houston as “one of the most ethnically and culturally diverse metropolitan areas in the country.” The city also has a growing international community.

For those considering relocating to Houston, Houston ranks high among the most affordable major cities in the U.S. The city has also landed on several “best of” lists, including the Travel + Leisure roundup of America’s Favorite Cities. Topping the list of its attractive qualities is its vibrant culture.
Along with offering remarkable and varied dining experiences, Houston is home to some exceptional performing arts institutions, including the Houston Grand Opera, Houston Ballet, Houston Symphony Orchestra, and the highly regarded Alley Theatre. In the visual arts, the city is home to The Museum of Fine Arts, the Contemporary Arts Museum of Houston, and The Menil Collection. The city is also home to some top professional sports teams, including the Astros (baseball), Rockets (basketball), and Texans (football).

Houston is known worldwide for its energy industry and its biomedical research and aeronautics. Renewable energy sources — wind and solar — are also growing economic bases as the city adapts to the needs of the 21st century. All in all, Houston is a vibrant, forward-looking city.

OPPORTUNITIES AND CHALLENGES

Opportunities abound at St. Francis to have a meaningful impact. With the opening of their Upper School several years ago, and the first class graduating in spring 2022, the work of building out that campus and keeping it connected to long-established PK-8 culture will be a key driver of growth and sustainability for the school going forward. There is a 36,000 square foot student center/Upper School building that is under construction and slated to open in fall of 2022. A multi-sport turf field has already been installed. There is also a master plan that is currently being revised and will require interaction with the Houston zoning board and close collaboration with the school’s facilities director.

Steve Lovejoy is in his tenth year with the school and his fourth as Head of School. He is seeking a strategic partner and forward thinker with strengths beyond accounting to manage high finance and forecasting. The board is dedicated to the success of the Upper School expansion and is seeking someone who can give them a clear understanding of long-term impacts of decisions being made now.
Forecasting and modeling skills will be essential in addition to outstanding presentations skills and transparency with debt management. In a larger sense, the school seeks a natural extrovert who is a visible presence around campus. The ideal candidate will possess strong communication skills and the ability to explain complex financial issues in a way that diverse audiences can understand. They seek not just be a steward of the budget, but an active collaborator who provides good counsel and transparency to those managing budgets at the school--someone who asks questions and seeks more information before decisions are made.

The business office is well staffed with several long-serving veterans of the school. They are in the midst of a very important transition from Senior Systems to Veracross that requires someone with good skills and experience implementing accounting software and integrating it with other modules deployed in the school’s various departments. The next CFO will need to generally possess good tech savvy as well strong management skills to assess workflow and find efficiencies and automations that will benefit the office. Hiring a new controller will also be an immediate need.

The ideal candidate will be a true partner with the Head of School with the strength to push back when needed. S/he will be a flexible, positive, and innovative CFO who will empower senior staff and have expansive executive reporting experience. With the new Upper School, the successful candidate must possess a “start-up” mentality and have the strength and vision to ensure the success of this dynamic K-12 school.
THE POSITION

The Chief Financial Officer serves as a member of the Executive Leadership Team and reports directly to and works under the direction of the Head of School. The CFO provides the Head of School and the Board detailed financial forecasts and works in partnership with the Head of School to implement the school’s strategic plan, school goals and initiatives as outlined by the Head of School. This individual is the supervisor for the Director of Facilities, Director of Technology, Director of Human Resources, Interim Controller, and Director of Explore & Extend (after school and summer programs), and works with the Head of School and budget managers in the preparation of financial forecasts and budgets.

Essential Functions

• Provides reliable and accurate financial information to the Head of School; Board of Trustees, its officers and committees; external auditors; donors; federal, state, and local authorities; and others internal and external to the school as directed and necessary.
• Supports the Head of School in the implementation of the strategic plan and school goals and initiatives as outlined by the Head of School.
• Oversees development and maintenance of the chart of accounts, establishment of accounting policies, and ensures internal financial control and financial regulatory compliance.
• Assumes administrative responsibility for the school’s endowment and investments and provides appropriate information on invested funds. Implements decisions of the Board’s Investment Committee; coordinates with the investment manager and other custodians of the school’s funds to implement effective endowment allocation, performance, and reporting.
• Directs all fiscal activities including all general ledger activities, accounts payable, accounts receivable, payroll, bank deposits, account reconciliations, and financial reports.
• Oversees the business office role in the preparation and distribution of enrollment contracts.
• Works with the Head of School and Human Resources to prepare and budget for employment contracts and benefit programs.
• Assists in maintaining congruency between the school’s Board-approved Mission Statement, the Long Range and Strategic Financial Plan and all activities of the business department.
• Supports and adheres to school policies in all areas of the school’s operation.
• Supports the Employee and School Handbooks and assists with revisions and updates, when necessary, of the school’s business office policies and procedures.
• Exhibits the behaviors described in the Faculty and Staff: Basic Expectations, Characteristics of Professional Excellence and complies with Physical Requirements and Work Environment.
• Is assessed through the Professional Growth and Evaluation Program.

Essential Tasks

• Works as part of the Executive Leadership Team focusing on strategy, vision, and leadership for all aspects of the mission, vision, and ethos of the school.
• Establishes and maintains relationships with banks, auditors, school attorneys, other financial institutions, and insurance brokers.
• Takes responsibility for the details of cash control and management and reports fraud.
• Signs contracts and checks on behalf of the school.
• Serves as the primary contact with the dining program vendors for both campuses. Coordinates with vendors, Head of School, and division leadership on dining program matters.
• Participates in the financial assistance awarding process and the resulting preparation and distribution of financial assistance enrollment contract addenda.
• Oversees purchasing, inventory control, auxiliary services, and regulatory compliance according to established laws, policies, rules, and regulations and establishes internal controls and procedures.
• Supports committees of the Board of Trustees as directed by the Head of School. Serves as the primary staff member for the Finance and Investment Committees and prepares reports and models as needed.
• Attends Executive Leadership Team meetings and Board meetings as required.
• Maintains a strategic financial plan and overall financial model that will demonstrate the trends and requirements of the school’s development plan and will forecast future year’s cash budgets and positions.
• Proactively works with staff and the Head of School on alternative revenue streams and various financial models to ensure the long-term financial health for the school.
• Coordinates with the Parish Business Manager as necessary for the effective and efficient operation of the community.
• Keeps the Head of School informed of all the school’s financial affairs and condition.
• Develops, researches, and attends professional development offerings.
• Knowledgeable about Senior Systems and Veracross software; uses both financial and enrollment management modules and/or other school management software programs.
• Completes various tasks related to the employee’s yearly goals and the school’s long range and strategic financial plan.
• Evaluates the Business Office’s strengths and weaknesses and develops goals/plans and systems that will improve department performance and customer service in accordance with the school’s strategic plan.
• Coordinates all aspects of the school’s risk management.
• Supports all budget managers and provides training as needed.
• Other duties and responsibilities as assigned by the Head of School.
• Employee may be required to work remotely or engage in telework activity as determined in the employer’s sole discretion.

DESIRED QUALITIES AND QUALIFICATIONS
• Certified Public Accountant with a bachelors’ degree in business or public administration, master’s degree preferred; minimum of 10 years’ experience in the areas of financial and business administration as described in job description.
• Experience in an independent school preferred though individuals with strong financial and leadership skills with other non-profits are welcome.
• Ability to communicate effectively, through writing and speaking, with school representatives, parents, students, and representatives from the business community.
• 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 and manage 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.
• Ability to work effectively as a team member and as an executive level administrator.
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 interest in this position
- A current and comprehensive résumé
- A list of five professional references, including name, relationship, phone number, and email address of each (references will be contacted only with the candidate’s permission) to:

  **John Clark**  
  Senior Consultant  
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  **Gregory G. Britton**  
  Managing Associate, Director of Search & Consulting Operations  
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