

A photograph of children playing on a playground structure, with a large teal circular overlay on the right side containing text.

The San Francisco School

DIRECTOR OF FINANCE & OPERATIONS

LOCATION
San Francisco, CA

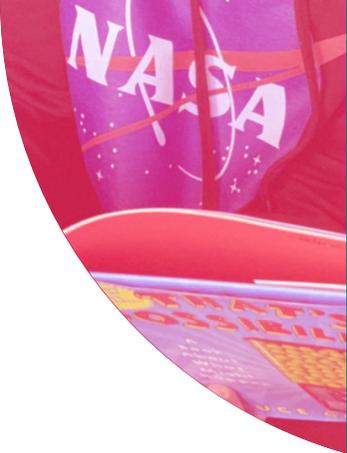
DECISION ANNOUNCED
March 31

APPLICATION DEADLINE
February 23

START DATE
Spring 2023
(No later than July 1, 2023)

FINAL ROUND
Week of
March 13

SALARY RANGE
\$170,000 - \$175,000



Summary

For over 50 years, The San Francisco School (SFS) has been a vibrant and inclusive educational community in the diverse Portola neighborhood in the southern part of progressive San Francisco. Educating nearly 300 students in Preschool through 8th Grade is a collaborative effort at this independent school where all voices are heard and social justice has always been a top priority. Since 2017, the School's strategic plan has laid out a commitment to humanitarian promise, prioritizing teaching and learning (Program), a diverse and inclusive community (People), and lasting connections to the surrounding neighborhood (Place).

SFS now seeks a director of finance and operations (DFO), who will get to start alongside the incoming head of school. The next head was announced in the fall of 2022 and will begin this summer following a successful, 15-year tenure of the outgoing head of school. When these two leaders arrive, they will find dedicated and experienced senior administrative colleagues. The DFO works at a strategic level on multiyear financial planning and plant construction projects, while at the same time plays a critical role in day-to-day financial oversight and operations. SFS has an innovative and highly committed board, a passionate and mission-aligned staff, and a diverse and welcoming community of families – all of whom depend on the DFO to ensure the School has the financial resources and operational capacity to continue to live out its bold and ambitious mission. The next DFO will report to the head of school and would ideally be able to start later this spring, to allow for a smooth transition of financial leadership, but no later than July 1, 2023.

MISSION

The San Francisco School cultivates and celebrates the intellectual, imaginative, and humanitarian promise of each student in a community that practices mutual respect, embraces diversity, and inspires a passion for learning.





Core Values

At the core of The San Francisco School are the values of culture, community, diversity, and belonging. From what SFS teaches to how the school teaches it, SFS strives to model these values and instill them in each student.

These values are natural but they do not come without the intentional effort the school dedicates to every facet of the SFS experience. Whether it's through opening day ceremonies, assemblies, Family Association events, Diversity Committee or Public Purpose Committee work, or teacher curriculum development, the school aims to embrace each family equally. SFS invites every family to participate in creating the culture and become an active member of the vibrant school community.

Five Tenets of an SFS Education

The San Francisco School believes students learn best when the following tenets are an integral part of their experience:

CURIOSITY

Students are natural explorers. SFS encourages students to ask meaningful questions and structure experiences for them to arrive at their own moments of discovery.

CHALLENGE

Students take great pleasure in progressing toward mastery. SFS cultivates learning by designing lessons with varied and increasing complexity.

COLLABORATION

Students grow through working with others. SFS models and teaches teamwork, cooperation, and problem solving across grades and disciplines.

COURAGE

Students are empowered when they face their fears. SFS urges students to take risks and embrace their mistakes.

COMPASSION

Students are capable of astonishing kindness and empathy. SFS inspires students to think beyond themselves and believe that their actions make a difference.





Uniquely SFS

DIVERSITY, EQUITY, JUSTICE, AND BELONGING

SFS actively supports all individuals to be their complete, authentic selves and fosters a community grounded in social and environmental justice. As a result of this effort, SFS aims for every person to thrive in an inclusive and culturally-rich context, fueled by diversity of thought, perspective, and experience, that enhances learning and supports the ability of individuals to fulfill their humanitarian promise.

The San Francisco School delivers on their mission by modeling and promoting equity, justice, interculturalism, neurodiversity, environmental sustainability, and peace in their work. SFS's commitment to being an equitable and inclusive community is intentionally woven into every facet of the school experience. Whether it's through academic and athletic opportunities, assemblies, school governance, committee work, or ongoing professional and curriculum development, SFS embraces each community member.





URBAN SCHOOL, VILLAGE ATMOSPHERE

The San Francisco School actively seeks to be a community where all types of people can thrive, and it values the richness of diversity in all its forms. Within this urban school, a vibrant village of learners and educators exists and supports one another. Some highlights of the program, campus, and community include:

- SFS teachers truly know their students. With small classes, an integrated curriculum, and a collaborative culture, SFS teachers are able to provide an optimal academic, creative, and social-emotional experience.
- SFS has ten dedicated specialist teachers in Spanish, Music, Art, and Health and Wellness. These classes occur from once to several times a week depending on the division.
- The Community Center features a full-size gym/350-seat theater.
- SFS offers Spanish beginning in Preschool and offers multiple proficiency levels beginning in Middle School.
- SFS offers a robust student support team, including learning specialists, a counselor, an educational therapist, coordinators for math and STEAM curricula, and a school nurse.
- SFS leaves its Adventure Playground intentionally wild, preserving a place where children can climb trees, pick flowers, play in the dirt, build forts, pick fruit from trees, play with rabbits and goats that visit each year, and go down a 50-foot slide.
- The wonderful chefs in the SFS kitchen cook delicious, healthy meals from scratch for Preschool-Elementary students as well as staff.
- Over half of the SFS campus comprises of outdoor space, including dedicated play yards for both Preschool as well as Kindergarten and First Grade.



Key Statistics

FOUNDED
1966

LOCATION

1.6-acre campus in **San Francisco, CA**, in the culturally and demographically diverse Portola neighborhood

CAMPUS

Over **50%** of the campus dedicated to outdoor space dedicated Preschool and Kindergarten play yards; **Adventure Playground** featuring slides, fruit trees, and animals; facilities include state-of-the-art theater and gym, rainwater cistern, and solar panel system

STUDENTS

277 students in grades PS-8
61% are students of color
11% of families identify as LGBTQIA

ADMISSION

Average acceptance rate of **24%** over the last three years; **95%** retention rate



FACULTY & STAFF

Student-to-faculty ratio of **6:1**
50% of faculty hold advanced degrees
Average tenure is **9** years
32% faculty of color
56% staff of color
Over **\$140,300** spent on professional development annually
77 staff members



Key Statistics

ACCREDITATION

California Association of Independent Schools

RELEVANT ASSOCIATIONS

National Association of Independent Schools (NAIS)

California Association of Independent Schools (CAIS)

California Teacher Development Collaborative (CATDC)

People of Color in Independent Schools (POCIS)

National Business Officers Association (NBOA)

California Independent Schools Business Officers Association (Cal-ISBOA)

Council for Advancement and Support of Education (CASE)



MAJOR REVENUE

Tuition and Other Programs: **89%**

Annual Giving: **8%**

Release from Endowment: **1%**

Other Revenue and Support: **2%**

FUNDRAISING ACHIEVEMENTS

In 2021, SFS completed a successful capital campaign, Forge Our Future, that raised 36% over their original goal, more than doubling their endowment. SFS consistently meets or exceeds their growing annual giving goals.

OPERATING BUDGET

\$11M

ENDOWMENT

Over **\$7,200,000**

FINANCIAL AID

Over **1.8 M** in financial aid awarded to 22% of SFS families

www.sfschool.org



The Importance of External Operational Partners



Over the years, The San Francisco School has established important relationships in the technology and operational realms. Knowing Technologies (KT) has been a partner to SFS for six years, providing faculty training, developmental opportunities, and more to enhance the School's technology department. HBM Operations (HBM) works with SFS in overseeing the facilities, maintenance, and operational aspects of the campus. Each organization and its support is vitally important to the financial and operational health of the school.

Knowing Technologies

Six years ago, SFS began its longstanding partnership with Knowing Technologies. As a technology consultant, KT works to provide schools with coaching, training, and IT support so technology can be used efficiently and effectively to best support students. Throughout this relationship, KT has been an operational partner to SFS in the areas of faculty IT training, strategic planning, and technology infrastructure. During the COVID-19 pandemic, KT played an integral role in allowing SFS faculty and staff to continue providing students with a transformative education, despite conducting all classes online. This partnership, along with the help of the school's director of design, engineering, and technology, continues to make technology a valuable resource for the students, faculty, and staff at SFS.

HBM Operations

HBM Operations is a strategic partner to SFS in the areas of facilities and maintenance. As a mission-driven company, HBM felt drawn to SFS's commitment to their own mission and values of equity and inclusion. Two HBM employees, including a facilities manager, are on campus each day ensuring that SFS remains safe, clean, and accessible for its students. HBM has also worked with the school's previous finance and operations leader to create facilities budgets and streamline campus projects during the school's summer breaks.





A Moment of Big Change

The San Francisco School (SFS) is one of San Francisco's oldest PK-8, co-educational independent day schools. In a diverse neighborhood in the southern part of this progressive city, SFS provides the feeling of a close-knit village, prioritizing a focus on the whole child and providing each student with a transformative learning experience. Students at SFS are encouraged to ask questions, remain curious, and harness their intellectual potential each day. The school and its curriculum are built to nurture each child; whether students are playing on the adventure playground, participating in music and art projects, or taking part in outdoor STEAM classes, each child is celebrated for their unique approach to learning. Presently, the school is turning its sights ahead to welcome its incoming head of school and director of finance and operations to its warm community.

This is an important time of transition for SFS. The school's beloved head of school, Steve Morris, is stepping back from his role after 15 years of service. At SFS, collaboration is part of the school's authentic approach to leadership and decision-making. This head of school transition has been rooted in mutual respect

and collaboration, and has kept the school's mission to serve each student in their early educational journey at the heart of the process.

During his time as head of school, Steve and the school's faculty and staff guided SFS through two re-accreditation processes, solidifying the school's ability to introspectively improve and accomplish its goals. The school also created and executed two strategic plans, in addition to running two successful capital campaigns. Most recently, SFS doubled its endowment amount and remodeled its campus STEAM facilities.

The incoming head of school, Juna Kim McDaid, is a thoughtful and compassionate leader. She began her career in education as a teacher, and has always loved being in the classroom with students. Juna has held various administrative positions throughout her career, ranging from department head to assistant head of school roles, and aims to keep the infectious energy of the classroom alive in everything she accomplishes. Driven by the desire to uphold SFS's values of inclusion and humility, Juna is excited to nurture each student's love of learning in her position as head of school.



As an independent school with 277 students, SFS understands the importance of financial resources. Over the past three years, the school has grown its endowment from \$2 million to \$7 million, despite the challenges of the COVID-19 pandemic. At the same time, emerging from the pandemic required a great deal of operational maneuvering and planning. For this and other reasons, the school ended the 22-23 fiscal year with a slight deficit – not normal for SFS.

With all of this said, the incoming director of finance and operations will be joining SFS at an exciting time. This individual should be ready to work collaboratively with SFS faculty and staff to manage the school's budgeting processes, while producing regular financial reports to the board of trustees. On the operational side, SFS understands the need to evolve alongside its students. The school has made necessary upgrades to its buildings, facilities and equipment in order to best support its young learners. Campus operations stayed on track throughout the pandemic, and the school has maintained a strong relationship with its outsourced operations partner. The DFO will oversee the financial and operational health of the school as it kicks off its upcoming strategic initiatives, including new strategic planning and accreditation processes.

SFS is a school that values diverse opinions and ideas, and prides itself on giving each individual a voice to be heard. The director of finance and operations will be working directly with the SFS leadership team, allowing each individual to challenge and formulate ideas while keeping the student experience at the forefront of each decision. In a school that is much like a “friendly neighborhood,” the DFO can look forward to fostering long-term relationships with students and their families, faculty and staff, and board members. While a relational approach is important in this role, deep financial and operational expertise is also crucial to the school's continued success. This individual should not be afraid to address challenges in a realistic manner, while simultaneously considering others' proposed solutions and perspectives.

The school is excited to welcome its new director of finance and operations in July 2023, or earlier by mutual agreement. We invite you to watch a short **INTERVIEW** with the incoming head of school, Juna, and the outgoing head of school, Steve, as they discuss their future goals for SFS and the importance of the DFO position.

About the Incoming Head of School



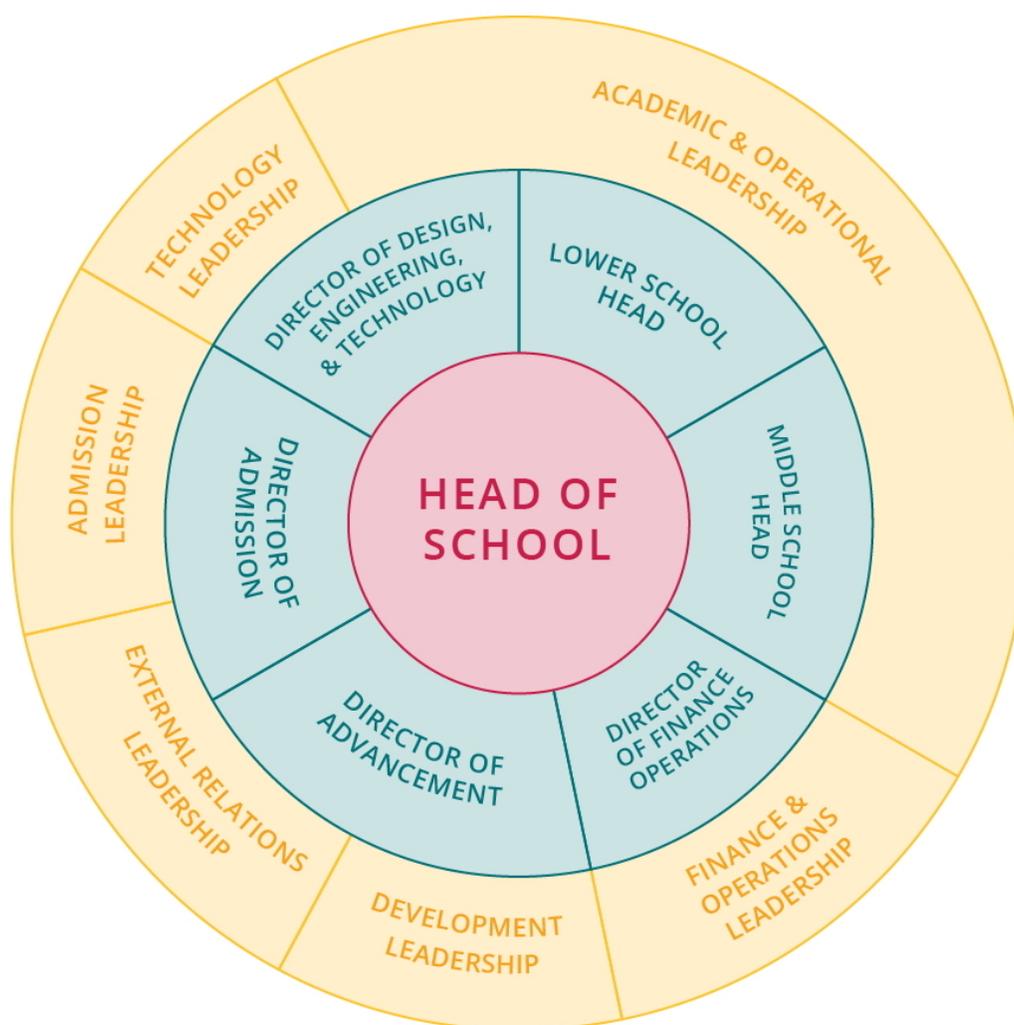
**JUNA KIM
MCDAID**

SFS is excited to welcome Juna Kim McDaid as the incoming head of school. With a background in both teaching and administration, Juna brings a strong passion for enhancing the life of each student to all that she accomplishes. She loves to experience the buzzing excitement of a classroom, witness the laughter and smiles shared between students, and create an environment for children to discover the best aspects of themselves.

As an administrator, Juna strives to foster a culture of equity and acceptance for all students, faculty and staff to be a part of. She understands the importance of embracing the diverse backgrounds of each person, and providing a space where individuals can feel celebrated for their unique attributes. Juna was immensely drawn to the mission and values at SFS, and is eager to bring her skills and passion to San Francisco in July.



Admin 7



The senior leadership team at The San Francisco School is highly collaborative, experienced, and dedicated. Called the Admin 7, the team comprises the head of school and six senior administrators, each of whom has a primary area of focus. Two division heads oversee different grade levels: the lower school head is responsible for Preschool through 5th Grade, and the middle school head is responsible for 6 - 8th Grade.

The director of design, engineering, and technology oversees the school's technology and innovation program, which spans all grades and requires significant partnership with the two other division heads in the area of academic leadership. Outside of core academics, two other administrators and the director of finance and operations (DFO) oversee areas involving revenue,

philanthropy, marketing, and external relations. The DFO's primary operational oversight responsibilities include facilities, security, health and safety, and kitchen. The DFO also oversees human resources.

Operationally, some areas are a joint partnership with other members of the leadership team. For example, the director of design, engineering, and technology oversees many aspects of IT operations, but also welcomes support from the DFO managing the vendor relationship. The division heads work closely with the DFO on major operational decisions, and in the past have overseen certain non-academic domains that have important touch points with teachers, students, and family



On the Horizon

The director of finance and operations will be joining the SFS community at an exciting time, with many goals on the horizon. These include launching the school accreditation cycle, as well as developing a new strategic plan. These processes go hand-in-hand and will allow SFS to deeply reflect on its goals, as well as deepen its commitment to its equity-focused mission and values. The DFO will be heavily involved in each of these initiatives, and work directly with the SFS leadership team, faculty, staff, and board members to put these upcoming plans into action.

Launching the Accreditation Cycle

As a CAIS-accredited school, SFS is preparing to launch its self-study accreditation cycle. This peer-reviewed process will begin in 2023, and aims to foster excellence in education and encourage school improvement through discovery, dialogue, compliance, and self-reflection. This self-study accreditation enables SFS to develop clearly defined goals and objectives based on its mission

and values. As an introspective process, it will require administrative support and oversight from the SFS leadership team, including the director of finance and operations. SFS will work to identify where it has met its goals from the previous accreditation cycle, and where it is hoping to make changes going forward.

Developing a New Strategic Plan

SFS is preparing to kick off the process of creating its new strategic plan in 2023. The strategic planning process will begin as the school completes its self-study accreditation, and will examine where goals were met and where improvements can be made going forward. In Spring of 2023, SFS will begin a bridge plan, which will allow the school to reflect on its self-study accreditation, and utilize those findings to construct preliminary strategic planning sessions. In 2024, the school will officially begin the exciting process of crafting its newest strategic plan. The creation of a strategic plan is an exciting opportunity to be a part of a collective process of envisioning goals and future growth for SFS.





Looking Ahead

New Ideas Under Consideration

BUS PROGRAM

SFS strives to bring an equity-focused lens to each initiative. With many of its students traveling to and from school from different parts of San Francisco and beyond, SFS is exploring a bus program for its students. This bus program is set to begin running from January to June 2023, and will reduce the school's carbon footprint, as well as ensure that students have access to a safe, reliable mode of transportation when commuting to and from campus. While this program is still in its early stages, SFS is looking forward to providing its students with an equity-focused and environmentally-friendly transportation option in the future.

MIDDLE SCHOOL LUNCH PROGRAM

SFS is hoping to establish an in-house middle school lunch program in the future. With an in-house PS-5th Grade lunch program already in place, SFS is looking to extend this program to serve its middle school students as well. The school's top priority is nurturing the whole child, and providing nutritious meals to each student helps to fulfill this promise. By bringing the middle school lunch program to their in-house kitchen, SFS would ensure that each middle school student is receiving a healthy lunch each day.

Important Areas of Focus

BUDGET AND FINANCIAL PLANNING

SFS is constantly striving to promote collaboration and transparency in the areas of budget and financial planning. For the incoming DFO, this planning will include regular monitoring of school spending, preparing monthly financial reports, as well as actively engaging with the SFS community to discuss the financial health of the school. In addition to increased budget and financial planning, SFS is also working to empower its faculty and staff leaders to work closely with the DFO in order to manage their departmental budgets.

HUMAN RESOURCES

In 2021, SFS contracted a third-party human resources service to best support its faculty and staff. The school recognized its need to alter its approach to HR services in order to provide appropriate resources to its community members. As part of this altered approach, the school recently made significant improvements to its salary structure. The incoming DFO will work closely with the HR department in areas such as budget reporting, salary management, and more. This department will likely expand in the future as the school continues to evolve its HR practices to best reflect the complex needs of the 21st century.



Desired Qualities of the Next Director of Finance and Operations



Duties

GENERAL LEADERSHIP, STRATEGIC DIRECTION, AND FINANCIAL MANAGEMENT

- Report to the head of school, participate as a collaborative member of the leadership team, and serve as a trusted advisor to the head, leadership team, and Board of Trustees.
- Oversee major initiatives during periods of capital improvement, including: large-scale borrowing, plant redesign, and construction.
- Build multi-year budget models and forecasts and develop key performance indicators to achieve the school's strategic priorities for its operating and capital budgets, along with its investments and endowment.
- Serve as lead liaison for the Finance, Risk & Audit, and Site Committees and provide effective communication, presentations, and updates to the full Board of Trustees.
- Publicly represent the school in a positive and proactive way, collaborating with other school administrators, neighbors, and public officials.

COMPLIANCE, RISK MANAGEMENT, AND REPORTING

- Oversee internal controls, cash management, banking relationships, and asset management, and maintain accurate and timely continuous records on the financial position of the school.
- Ensure that the school is in compliance with all local and state reporting requirements.
- Oversee and ensure the successful completion of the annual independent audit.
- Monitor and mitigate risk with a comprehensive risk management and insurance program.
- Provide transparent financial reporting, planning, and budgeting processes that build trust among administrators, faculty, staff, students, alumni, parents, and trustees.

OPERATIONAL MANAGEMENT AND OVERSIGHT

- Oversee the core operations of the business office, which includes a full-time controller.
- Oversee human resources, which includes a part-time, third-party HR consultant.
- Oversee several operational areas of the school, most of which are led by managers or directors: facilities, extended day, strategic initiatives, kitchen, and front desk.
- Provide counsel and guidance to other members of the leadership team as they lead other areas of school operations.
- Collaborate with the head of school and other senior administrators to provide leadership regarding employee compensation and benefits.
- Develop processes and systems that provide clarity--and flexibility when necessary.
- Perform other duties as assigned.



Qualifications & Qualities

PROFESSIONAL QUALIFICATIONS

- Possession of a bachelor's degree from an accredited college or university in business administration, finance, accounting, or a related field, which is a minimum requirement; an MBA or graduate degree highly preferred
- 5+ years of management-level experience in areas of finance and operations, preferably in an educational, not-for-profit, or mission-aligned organization
- Previous supervisory and governance experience, preferably in an educational, not-for-profit, or mission-aligned organization
- A comprehensive skill set for oversight of financial reporting, budgets, investment and endowment strategy, accounting, facilities, construction and project management, HR, technology, and risk management.

DESIRED EXPERIENCE, SKILLS, AND MINDSETS

Senior Leadership

- An ability to analyze complex situations, keep on top of details, and stay organized within tight deadlines
- A commitment to delivering outstanding project management and strategic planning
- An excitement about working with a new head of school and highly talented leadership team
- Excellent communication and presentation skills

Cultural competency

- Demonstrated cultural competence skills that allows for successful collaboration across diverse cultures and backgrounds
- An open mind that asks questions, learns from others, and brings a collaborative and respectful approach to problem solving
- An ability to build relationships and trust with constituents from diverse cultures and backgrounds
- Experience looking at decisions or problems with a diversity, equity, and inclusion perspective that leads to increased access and inclusion

Community partner

- Alignment to the mission and values of SFS
- A love of education, and a willingness to support innovative teaching and learning at an early childhood to grade eight independent school
- Authentic empathy, warmth, and collegiality
- A cooperative and growth-oriented mindset ready to build consensus





How to Apply

12M Recruiting is acting on behalf of The San Francisco School to identify exceptional finance and operations leaders to fill this extraordinary opportunity.



Applications will be considered through February 23, 2023.

All applications must be submitted online: WWW.12MRECRUITING.COM/JOBS/SFS

An application requires submitting four PDFs:

- Cover letter introducing yourself to The San Francisco School search committee
- CV or resume
- A list of four references (include each person's name, current organization, title, phone number, email, and past connection to you — though we will not contact any references without obtaining your permission first)
- A response to the following prompt:

Beside supporting the expansion of tuition assistance, what are other ways that a school's business office—and the director of finance and operations in particular—can advance goals of diversity, equity, inclusion, and belonging?

The San Francisco School is committed to policies that will increase staff diversity, both to reflect the high value SFS places on a multicultural understanding, and for the direct benefit of each student. The San Francisco School is an equal opportunity employer. We continually strive to build an inclusive culture in our diverse community. The San Francisco School encourages applications for employment from all qualified individuals without regard to race, color, religion, gender, sexual orientation, gender identity or expression, age, national origin, marital status, citizenship, disability, and veteran status.

