



The Charlotte Latin School seeks a new Chief Financial and Operations Officer (CFOO). With a tentative start date of July 1, 2022, this opening is in response to the retirement of a longstanding employee.

Big Back Pack has been retained to lead a national search for its next CFOO. For more information, contact Steve Mandell at steve@bigbackpack.org.



The School's Mission

The mission is to encourage individual development and civility in our students by inspiring them to learn, by encouraging them to serve others, and by offering them many growth-promoting opportunities.

The School's Core Values

Honor Above All

Charlotte Latin embraces the development of personal honor as a lifelong pursuit in the building of character. Adherence to the Honor Code is required from all members of the School community. We honor one another and our personal gifts and accomplishments.

Commitment to Excellence

The quest for excellence that has characterized Charlotte Latin since its founding extends to all aspects of school life, and is viewed as the effort to do one's best and to seek to improve continually. This quest embodies the boundless spirit that characterizes our school community, and it is grounded in our commitment to create an exceptional environment for teaching and learning.

Leadership

Charlotte Latin encourages the development of leadership as a lifelong characteristic of our students and adheres to the concept of service to others (servant leadership) as the ideal model that best meets the needs of our school community, our nation, and the world.

Respect for Oneself and Others

Respect is the foundation of the Charlotte Latin School community. We celebrate differences that include diverse people, cultures, and perspectives.

Personal Responsibility

Each person at Charlotte Latin is accountable for his or her actions. We all share responsibility for the welfare of the greater School community.

Moral Courage

Charlotte Latin leads by example and our members are willing to do what is right and true through the courage of their convictions in spite of possible consequences or the opinions of others. Morally courageous people are willing to admit their mistakes, to address injustice, and to uphold the principle of “Honor Above All.”

Charlotte Latin is a community of professionals who value emotional intelligence and who enjoy the give and take of pursuing excellence. Candidates from diverse cultural and ethnic backgrounds are strongly encouraged to apply.

The Position

The Chief Financial and Operations Officer (CFOO) will manage the finance and operation functions of the School. The CFOO works closely with the Head of School and the Finance/Investment Committee of the Board of Trustees to ensure effective fiscal management of the School as well as manage its investments. This role works with the Building and Grounds Committee and the Facilities staff to maintain the facility/property at a high level.

Reporting to the Head of School, the CFOO supervises all business office personnel, facilities, information technology, security, financial aid, and summer programs personnel.

The School is seeking a financial professional with a high level of expertise who is also an effective communicator and a true team player. Successful candidates will have measurable experience in finance and a background or interest in operations, as well as demonstrated leadership in a strategic role. Experience in an independent school or non-profit organization is preferred.

Functional Responsibilities

Strategic Partnerships

- Lead the Board in the areas of finances, facilities, and investments
- Collaborate with fellow Leadership Team members to support initiatives and operations that are aligned with the school’s mission and meet the school’s strategic objectives.
- Conduct regular meetings with division and department heads to ensure that priorities are clear and that coordination and implementation is sound.
- Foster, maintain, and manage relationships with adjacent neighborhoods and its numerous outside vendors.

- Represent the school in local, regional, and national organizations
- Develop department and operations goals, objectives and systems

Financial Planning and Financial Management

- Manage the planning and execution of the budgeting process
- Provide the planning and execution of long term financing, as needed
- Manage the School's long term endowment investments and its short term cash investments
- Supervise the accounting of all transactions during the fiscal year and prepare financial reports for the Board and annual statements for our year-end audit

Operations

- Oversee the facilities and security departments to provide a safe and secure campus for all students, employees, and visitors
- Work with the technology office to oversee and manage the school's computer infrastructure and classroom platforms for the lower, middle and upper school levels.
- Partner with Human Resources and external brokers annually to review benefits and retirement plans
- Lead the planning and execution of construction projects
- Provide support for Advancement initiatives of the school
- Supervise the financial aid process, prepare files for committee review, and respond to family inquiries
- Maintain a culture of integrity and customer service in all dealings
- Maintain compliance with federal and state regulations
- Comply with School policies and procedures.
- Perform other duties as needed.

Opportunities for the new Chief Financial and Operations Officer

- Examine existing financial systems, business relationships, infrastructure and operations to suggest/implement enhanced and streamlined services.
 - Work in building and maintaining a strong business office and operations team.
 - Examining ways to support a long term endowment growth strategy.
 - Collaborate with key revenue areas of philanthropy and enrollment to create strong reconciliation and forecasting systems.
 - Lead in the successful implementation of a new accounting management system.
 - The CFOO will be encouraged to bring new ideas on a range of issues, including tuition pricing, financial aid, increasing revenue and internal policies and controls that allow for effective school communications related to budgeting, forecasting, and long-term viability.
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Core Qualifications and Credentials

Candidates should possess the following requirements and skill sets:

- Bachelor's degree in accounting or finance is required, CPA, M.B.A. and/or a master's degree in a related field preferred
- Ample work experience in a financial and business leadership position, seven years of leadership experience is preferred.
- Experience in an independent elementary or secondary school, higher education or non-profit organization is preferred. Individuals with financial and leadership experience in a related field are encouraged to explore this opportunity.
- Demonstrated knowledge and understanding of financial systems, modeling and forecasting, investment and risk management, support services administration, business services, human resources and benefit administration
- Proven ability to productively interact with multiple stakeholders at all levels of school community
- Knowledge of and experience in setting up effective financial controls.
- Strong background in finance, budgeting, and cash management.
- Skilled negotiator able to procure optimal agreements and contracts with external vendors while serving the school's best interests.
- Proficiency in the use of technology and systems implementation.

To Apply

Interested and qualified candidates should submit electronically in one email and as separate PDF documents the following materials:

- A cover letter expressing their interest in this particular position
- A current résumé
- An annotated list of professional references with contact information. References will be contacted only with prior candidate approval.



All materials should be sent via email either:

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Charlotte Latin does not discriminate on the basis of sex, race, color, religion, age, sexual orientation, disability, national origin, veteran status, military service obligation, or citizenship status with regard to employment practices including hiring, termination, discipline, promotions, pay, or other terms and conditions of employment.