

# PRESIDIO KNOLLS SCHOOL 普利西学校

## **Chief Finance and Operations Officer Opportunity**

Presidio Knolls School  
San Francisco, California

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 School operates with strong enrollment demand, \$20M in annual revenue, \$13M in reserves, \$70M in assets, and consistently clean financial audits.

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 and Operations Officer (CFOO) 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 with the school's financial profile and strategy. Working with the Board of Trustees, the CFOO will build a strong working relationship with dedicated colleagues, who are 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 CFOO will contribute to the maturation of the school while maintaining the 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 CFOO will balance strategic plan implementation with attention to policies and procedures that will allow the school's professional community to flourish. The CFOO will lead an experienced and dedicated business office that is eager for collaboration, communication, and professional development opportunities. The CFOO 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 CFOO 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.

### **Upcoming CFOO strategic projects:**

- Complete feasibility study of proposed \$30M capital project of a new 20,000 square foot building.
- Re-envision the School's approach to socio-economic diversity through development of a flexible financial aid and tuition model.
- Support high teacher retention and a strong workplace culture through the development of a competitive compensation program.
- Participate in an enrollment strategy plan which will bolster the School's continued growth and sustainability for years to come.

**Responsibilities:**

- In close partnership with the Head of School, make strategic decisions that reflect the School's mission, vision, and core values.
- Develop, implement, and oversee plans and programs related to accounting, finance, investment, audit, compliance, financial aid, risk management and purchasing.
- Maintain all proper financial controls and systems, and prepare annual budgets for approval by the Board.
- Participate in long-range financial planning, strategic planning, facilities planning, capital project planning and implementation, and annual facilities maintenance planning and implementation.
- Oversee, directly or indirectly, all construction projects.
- 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.
- Oversight of 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.
- Direct reports include Director of Operations (who is responsible for HR, Facilities and HR), Controller, and Registrar.

**Qualifications and Personal Attributes:**

- 10+ 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, however 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.
- Experience in human resource management, employee benefits, 403b 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 orientation and entrepreneurial mindset.
- Strong commitment to equity and inclusion practices.
- Bachelor's degree required, with preferred emphasis on finance, accounting, or related field. MBA or CPA preferred.

**Salary Range and Benefits**

\$250,000 to \$300,000, 100% employer paid medical, dental, and vision for employee, 403b plan matching, monthly commute subsidy, and tuition remission up to 75%.

**Contact**

This retained search is managed by Mary Law of Mary Law Executive Search, the California leader in placing independent school and nonprofit Finance and HR professionals.

**Mary Law**

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