

Lick-Wilmerding High School

CHIEF FINANCIAL AND OPERATIONS OFFICER

LOCATION

San Francisco, CA

POST DATE

January 23, 2025

PRIORITY DEADLINE

February 23, 2025

REMOTE SEMIFINAI ROUND

Week of March 17

ON-SITE FINAL ROUND

Week of March 31

DECISION ANNOUNCED

April 18, 2025

START DATE

July 1, 2025 (or earlier by mutual agreement)

REPORTS TO

Head of School

SALARY

\$300,000 - \$330,000







Summary

Lick-Wilmerding High School is a private school with public purpose, serving 560 students in grades 9-12 in San Francisco. Since its founding in 1895 as a vocational school, Lick-Wilmerding has built upon a long tradition of valuing and integrating the liberal arts, sciences, technical arts, visual arts and performing arts to offer a robust college-prep curriculum. Today, the LWHS curriculum is both a catalyst and a vehicle for civic engagement, and the Public Purpose Program offers students the opportunity to contribute their time, talent, and treasure through partnerships with community organizations. Students demonstrate an unparalleled commitment to their communities, the motivation to deeply explore their interests, and a desire to positively impact the lives of others.

The chief financial and operations officer (CFOO) is a pivotal role at LWHS, and oversees all financial and operational aspects of the school, including budgeting, human resources, facilities, safety, dining, and reception. Leading a large portfolio of eight direct reports across multiple departments, the CFOO must effectively manage time, resources, and strategy. The CFOO serves as a key thought partner to the head of school on strategic and long-term financial matters, to whom this role reports. The CFOO must be able to lead financial and operational discussions and initiatives with a deep commitment to and appreciation for Lick-Wilmerding High School's mission and DEIB values. Ideally a graceful handoff between the outgoing CFOO and incoming CFOO would occur later this spring. Either way, LWHS needs its next CFOO to start no later than July 1, 2025.

MISSION

A private school with public purpose, Lick-Wilmerding High School develops the head, heart, and hands of highly motivated students from all walks of life, inspiring them to become lifelong learners who contribute to the world with confidence and compassion.



History

1874

James Lick establishes a trust of \$540,000 to endow the California School of Mechanical Arts, now commonly referred to as "Lick."

1894

Jellis Clute Wilmerding leaves \$400,000 to the Regents of the University of California to establish and administer another school, the Wilmerding School of Industrial Arts — a school for boys specializing in building trades and architecture drafting.

1912

George Merrill opens the Lux School for Industrial Training for Girls, using space from the Lick facilities, with a curriculum focused on sewing and textiles, food, health, art, and retailing and merchandising.



1913

Lux opens its own building the following year, on land purchased from the Lick and Wilmerding Schools. The original Lux building still stands today at the corner of 17th and Potrero Streets in San Francisco.

1952

Lux closes, but its early contribution to women's education becomes a national model and significant accomplishment.

1955

Lick and Wilmerding merge to form Lick-Wilmerding High School, and moves to its current campus on Ocean Avenue. It becomes a boys-only school, and begins to develop its outstanding collegepreparatory curriculum.

1972

Lick-Wilmerding High School becomes coeducational once again and, shortly thereafter, begins charging tuition for the first time in its history.

1986

Two Lick-Wilmerding High School faculty co-found Aim High, a summer school program for public middle school students that would later grow to nearly twenty campuses.

2018

Lick-Wilmerding
High School finishes
renovating its main
building, the third
of three major
construction projects
since 1997 (first two:
library and shops)





Vision for Equity & Accountability

Lick-Wilmerding High School strives to cultivate a diverse, collaborative community of students and adults that is rooted in empathy, equity, respect, humility, and accountability. We commit to uphold the tenets of anti-racism and to interrupt all forms of interpersonal and institutional bias and discrimination. We aspire to create safe, joyful spaces for learning where everyone brings their whole selves, feels known and heard, lifts each other up, and engages in all aspects of life at LWHS and beyond.



Community Norms

SPEAK FROM THE "I" PERSPECTIVE
LEAN INTO DISCOMFORT
RESPECT THE MESSINESS OF IDEAS
SUSPEND JUDGMENT OF SELF AND OTHERS
HONOR CONFIDENTIALITY
ACCEPT SILENCE AS PART OF THE PROCESS
TAKE SPACE, MAKE SPACE, INVITE IN
SEEK MULTIPLE PERSPECTIVES, TREATING THE
CANDIDNESS OF OTHERS AS A GIFT

Sam Mihara '51 Day of Justice

Every spring the entire LWHS community participates in an in-house conference that explores identity, privilege, and oppression planned by students who have attended the NAIS Student Diversity Leadership Conference, the White Privilege Conference or the Creating Change Conference. Workshops are led by faculty, staff, students and local facilitators or activists. Past session topics have included microaggressions, how ideas about gender impact politics, different belief systems, orientalism, and rap as activism, to name a few. While it can be challenging to explore the cycle of oppression, the Sam Mihara Day of Justice ultimately aims to inspire compassion and a commitment to equity within all LWHS community members.



Key Statistics

Founded in 1895

Average class size:

17

CAMPUS SPACES INCLUDE

- Technical Arts "shops"
- caféteria
- full-court gymnasium with rock climbing wall
- music studio
- dance studio
- photography studio with darkroom
- 7,100 square foot library

560 total students

70% students of color

74% of students participate in a sport

57% of students participate in performing arts



DIVERSITY

Of the **560** students at Lick Wilmerding High School:

7-14% of each class are first generation-to-college students

12% Black or African American

40% Asian incl. East and South Asian

17% Latinx

60% White, with **40%** identifying as multiracial

67 faculty members with an average of

18.6 years of teaching experience

48 with Master's degrees

3 with PhDs



\$7.6 millionallocated for Flexible Tuition

www.lwhs.org



Financial Statistics

Audited financials as of 6/30/24

FINANCIAL AID

\$7MM+

REVENUES

85.5% Tuition & Fees

5.7% Annual Fund

7.2% Endowment Funding

1.6% Miscellaneous Income



EXPENDITURES

53% Salaries & Benefits

20% Financial Assistance

11% Instructional/Technology

6% Facilities & Campus Operations

5% General Administrative

5% Debt Service

TOTAL PHILANTHROPIC SUPPORT

\$2.36MM

\$2.1MM+ Unrestricted Annual Fund Contributions



ASSETS

\$176,675,913

Total Assets

\$71,238,210

Endowment

\$9,042,864

Plant Fund





Strategic Plan

As LWHS celebrates its 125th year, this next chapter of our school builds on recent accomplishments and enduring strengths, including:



Our diverse and vibrant community of learners that mirrors the Bay Area and broadens the perspectives of each community member.



Our commitment to public purpose exemplified by the work of The Center for Civic Engagement.



A diverse, talented, and committed faculty and staff who collaborate, innovate, and model their passion for learning.



Broad interest in the school, enabling LWHS to craft a learning community that embodies our mission.



An outstanding academic program and ever-evolving Head, Heart, Hands philosophy that asks students to use knowledge and skills to address the most complex societal issues.



A solid financial foundation and increased charitable giving to support the school and its commitment to access and success for all of our students.



Our nationally recognized technical arts program that builds upon the foundation of the school, teaching students to solve problems and demonstrate resilience.



A beautiful urban campus marked by innovative design, a sustainable footprint, and spaces that foster collaboration and connection.



Head, Heart, & Hands



LWHS prepares its students to thrive in college and to be passionate, self-directed, lifelong learners. Toward these ends, its faculty employ a wide range of teaching methods, intended to help every student succeed. LWHS has a long tradition of valuing and integrating the liberal arts, sciences, technical arts, visual arts and performing arts. The resulting rigorous head, heart, hands curriculum provides students with a "toolbox" with which to build lives of consequence and fulfillment. In order to prepare students to assume responsible adult roles in the world, ethical thinking is explicitly woven through the curriculum. Similarly, problem solving and collaborative skill building, including learning when to lead, when to listen, when to contribute, and when to follow, are integral to a LWHS education. Prizing innovative thought, most distinctively through the integration of science, technology and design, LWHS encourages students to marshal the courage to make mistakes in order to learn and become more resilient. LWHS further believes that mindfulness and healthy ways of being, including seeking balance in one's life, are essential to living a life of care — for self, family, community, and environment.



A Public Purpose

As a private school with a public purpose, service and community engagement are at the core of an LWHS education. The LWHS curriculum is both a catalyst and a vehicle for civic engagement, offering real world insights and inspiring students to contribute their time, talent, and treasure to work that matters. The larger community — local and global — is an extension of LWHS classrooms, providing students opportunities for thoughtful and effective problem solving and stewardship. In addition, LWHS shares its innovative educational models, as well as its knowledge, networks, and resources, with others who are committed to improving lives, prospects, and possibilities for young people.

The Public Purpose Program is a way for students to truly live LWHS' mission and meaningfully engage with local, national, and global communities. During their four years at LWHS, all students will participate in the Public Purpose Program (PPP), which guides students in several ways, from recognizing how to apply their education and unique talents, to ultimately affecting positive change and social justice.



The Shops



Technical Arts

With hands-on processes and projects at the core, LWHS Technical Arts teaches at the junction of Design & Engineering & Craft in service of Connection & Community & Purpose. Lick-Wilmerding Technical Arts is more than the "hands" part of the school. Courses in Jewelry, Code, Wood, Sewing, Metal, **Digital Fabrication, and Electronics** are a place to skill up and connect with your and your peers' humanity. It's a place to learn about designing, prototyping, and building things together that bring joy, confidence, and meaning. Regardless of future study or career, Technical Arts classes teach students about project management, working in teams across differences, persistence in the face of challenge, being resourceful, object and experience design, and craftspersonship. Classes emphasize hard and soft skills and help form whole and flexible young adults, of all identifiers, for a changing world.

Visual Arts

Visual Arts teachers encourage students to explore their imagination, tap their experience and knowledge about the world, and trust their unique vision without fear of failure. We stress visual literacy, conceptual thinking, experimentation, craftsmanship and commitment. We ask our students to explore, take risks, persevere and deepen their visual perceptions honestly, reflectively and carefully. Our intention is to inspire them to be curious, creative and courageous, but also disciplined and attentive. We hope that through the development of their visual literacy our students will become more confident in the uniqueness of their vision.





Athletics & Performing Arts



Athletics

Currently, the Athletics program at LWHS is comprised of 30 teams representing 10 different sports at the Varsity, Junior Varsity, and Frosh/ Sophomore levels. More than 75 percent of the student body participates in athletics throughout the academic year.

CCSF Partnership

LWHS students have access to City College of San Francisco's Health and Wellness Center, an expansive athletic complex located across the street from the LWHS campus. The Wellness Center houses multiple weight rooms, cardiovascular facilities, basketball courts, a 25 yard indoor swimming pool, all-weather track, eight tennis courts, and a turf soccer and lacrosse field.

Performing Arts

The Performing Arts department educates students in the craft, theory, and philosophy of the performing arts for the purpose of promoting personal and societal transformation. We provide students with an artistic platform in which they have the support to create, engage, and explore, fostering students' individuality, creativity, empathy, human connection, and discipline. We are committed to the representation of all perspectives and presenting work with a cultural, social, and historical foundation to empower students to develop their personal aesthetic, as well as reflect on their role as it extends beyond the classroom.







Kitchen & Facilities Team



Facilities

A clean, safe, and efficient campus is what enables Head, Heart, Hands learning. In the facilities department, we are proud of the LWHS campus and are always looking for new ways to ensure that the buildings, operating systems, grounds, and overall environment contribute to a comfortable and safe learning space.

HBM OPERATIONS

HBM Operations is a strategic partner to LWHS in the areas of facilities and maintenance. 7 HBM employees, including the director of facilities, complement our in-house staff on campus each day ensuring that LWHS remains safe, clean, and accessible for its students and faculty.

Dining services ANN MAISEL CAFÉ

The Food Service program at LWHS focuses on providing healthy, nutritional meals and snacks for 560 students and more than 125 faculty and staff in order to build community and model healthy eating habits and environmental stewardship. Cooked from scratch and made fresh daily, the Food Service team uses local and organic produce whenever possible. For instance, LWHS supports local produce purveyors such as Greenleaf products that in turn work with small local farmers.



CFOO Areas of Oversight

The CFOO is responsible for a number of key functional areas of the school including the business office, HR, facilities, dining services, reception, and safety and security. The CFOO has a team of 8 direct reports, and additional indirect reports including contract employees for dining services and facilities (third-party contractor: Hines Building Maintenance). While technology currently reports to the CFOO for the '24-'25 school year, a new dean of technology will begin this coming summer and assume responsibility for managing the technology unit.

At the core of the CFOO's responsibilities lies exceptional financial stewardship for the school. Thus, the incoming CFOO should have deep expertise in financial leadership and budgeting, and the ability to nimbly balance time between financial oversight and the school's broader operational functions. Given the breadth of operational areas under the CFOO's purview, the incoming CFOO may have the opportunity at some point in the future to reorganize the way that operational units are managed and governed, so that not all those units roll up directly to the CFOO.





Areas of Focus

1. Strategic Leadership and Partnership with the Head of School

The chief financial and operations officer (CFOO) serves as a key member of the head of school's leadership team, providing guidance and support in navigating both day-to-day operations and long-term strategic decisions. This relationship as the senior financial strategist is paramount for the head of school, who seeks a thought partner able to provide steady guidance. The CFOO also works closely with the Board of Trustees, ensuring effective communication and the provision of vetted financial content, including benchmarking, budgets, and audits. In both these capacities, the CFOO maintains a balance of being both a supporter and a sounding board, helping the head of school maintain focus on mission-driven decisions while offering financial expertise and insight.

2. Financial Leadership and Operational Stewardship

A core responsibility of the CFOO will be leading all financial functions within the school, including accounting, budgeting, flexible tuition, and audit processes. The CFOO will oversee the business office team, ensuring accurate and timely financial reporting while driving improvements in financial transparency throughout the institution. This includes educating various stakeholders—staff, faculty, parents, and the board—on the school's financial health and strategies through clear communication and storytelling. The CFOO will also manage relationships with external partners, such as bankers and lenders, and ensure the school's fiduciary responsibilities are upheld, balancing risk management with the school's long-term mission and sustainability.

3.OperationalEfficiency andSystem Integration

The CFOO will be tasked with automating and integrating systems across the school to improve operational efficiencies. This includes overseeing critical operational functions such as HR, facilities management, dining services, and safety and security, ensuring that all areas are running smoothly and aligned with the school's strategic priorities. The role requires a systems-thinking approach to problem-solving, working collaboratively with other leaders to implement streamlined processes that enhance the overall functioning of the school. The CFOO will drive initiatives aimed at improving internal processes, promoting financial sustainability, and ensuring that the school operates in a financially responsible and efficient manner.

4.
Long-Term
Sustainability
and Resource
Stewardship

Looking ahead, the CFOO will play a vital role in ensuring the school's long-term financial sustainability. This includes planning for the future of tuition, endowment, and flexible tuition, as well as responding to demographic shifts and external challenges. The CFOO will work to ensure the school is well-positioned to weather future economic fluctuations and demographic changes, while maintaining a focus on social responsibility and resource stewardship. In this role, the CFOO will lead efforts to secure the institution's future, balancing financial health with the core values of the school, and providing strategic insights into areas like fundraising and long-term financial planning.



Background & Opportunities



Lick-Wilmerding High School (LWHS) is a private school with public purpose, serving 560 students in grades 9-12 in San Francisco. Since its founding in 1895 as a vocational school, LWHS has built upon a long tradition of valuing and integrating the liberal arts, sciences, technical arts, visual arts and performing arts to offer a robust college-prep curriculum. Today, the LWHS curriculum is both a catalyst and a vehicle for civic engagement, and the Public Purpose Program offers students the opportunity to contribute their time, talent, and treasure through partnerships with community organizations. Students demonstrate an unparalleled commitment to their communities, the motivation to deeply explore their interests, and a desire to positively impact the lives of others.

The chief financial and operations officer (CFOO) is a pivotal role at LWHS and reports directly to the head of school. The current CFOO has enjoyed a successful tenure at the school since 2019 and will be departing at the end of the 2024-2025 school year in June. She will be leaving the school in excellent financial standing with a strong balance sheet including plant and operating reserves. The incoming CFOO will also have the opportunity to contribute to the school's next strategic planning process that will begin later this year.

The CFOO has broad oversight and leads all financial and operational aspects of the school, including budgeting and financial strategy, human resources, campus facilities, safety and security, dining services, and reception.

Consequently, the CFOO's team is one of the largest on campus — eight direct reports with an additional four indirect reports — which requires someone well-versed in time-management, staff development, and divisional leadership.

LWHS is in a stable financial position, and the CFOO oversees the school's budget, annual audit, and long-term financial planning and strategy. The head of school, who is in his second year at LWHS, will also look to the CFOO to provide thoughtful strategic partnership in guiding and communicating financial strategy in alignment with the school's overall mission. This is especially pertinent as the CFOO oversees the school's flexible tuition program in partnership with the director of admissions and financial aid officer. This robust program supports the socioeconomic diversity of the student body at Lick-Wilmerding High School, and enables students to attend the school regardless of a family's financial situation. As this is such a core component to the school's mission and financial priorities, the incoming CFOO should be eager and willing to collaborate and communicate with



stakeholders across campus to ensure this program — and other programmatic initiatives aligned with attracting and retaining diverse students and faculty — remains a top priority for the school, while also ensuring that ongoing budgets and annual tuition-setting promote the school's long-term sustainability.

Reporting to the CFOO is a dedicated, collaborative business office. The controller, who has been at LWHS for nearly 20 years, oversees most of the day-to-day finances and supervises a senior accountant, who has been at LWHS for just over 8 years. The financial aid officer, who has been at LWHS for 16 years, oversees financial assistance and accounts payable The incoming CFOO will thus be joining a seasoned, capable team in the business office that is comfortable with a high degree of autonomy, but will eagerly welcome the CFOO's strategic input and hands-on support when needed. In addition to the controller, senior accountant, and financial aid officer, the business office also includes a human resources manager who began earlier this year — a new position that has greatly reduced the day-to-day involvement of the CFOO in payroll and benefits management. That said, the CFOO still plays a key role in complex HR legal matters, and provides strategic guidance on faculty and staff recruiting and salary setting.

In addition to leading the finance and business office, the CFOO also oversees a number of operational units including facilities, dining services, safety and security, and reception. These teams comprise both LWHS staff and a number of employees contracted through external vendors — Hines Building Maintenance for facilities and maintenance, and Joffe for security. The incoming CFOO will continue to provide strategic oversight for these functional areas, in addition to building long-term risk management and operational plans. While the current CFOO directly supervises key leaders on a significant number of operational teams, there may be an opportunity at some point in the future to reorganize the way that operational units are managed and governed, so that not all those units roll up directly to the CFOO. But as important as these many operational areas are, LWHS is first and foremost seeking a CFOO with outstanding financial acumen, skills, and experience — to ensure that the school's longterm financial position remains stable and robust in support of a diverse array of programs and operations.

In addition, the incoming CFOO should have a depth of cultural competence and commitment to DEIB, and the ability to lead a team with exceptional warmth, tact, and clear communication. Not only should the incoming CFOO be able and willing to provide guidance on mission-driven decisions, financial strategies, and institutional planning, but the CFOO should also be able to clearly support and communicate the head of school's vision to stakeholders across campus, including the board of trustees. Lick-Wilmerding High School looks forward to welcoming its next CFOO to begin on or before July 1, 2025



Raj Mundra Head of School

The 2024-25 school year is Raj Mundra's second as head of school at LWHS. Before accepting the head of school position at LWHS, Raj served in a number of roles at Phillips Academy in Andover, MA, including dean of studies and the deputy head of school for academics and residential life. In addition to his time at Andover, he has also served as the deputy head of the secondary school at the Aga Khan Academy in Mombasa, Kenya in 2003, and as a visiting faculty member in science and service at the American School of Bombay in 2010. Mundra holds a B.A. from Brandeis and a MAT in teaching biology from Brown University.

We invite you to <u>watch our interview</u> with Raj, who discusses his eagerness to partner with the CFOO and welcome an exceptional financial and operations leader to the LWHS community.



Duties

Financial Strategy & Leadership

- Oversee financial strategy for LWHS, working closely with the head of school and board
 of trustees to ensure tuition setting, endowment draw, cash management, balance
 sheet management, and annual budgeting cycle are coordinated to meet the long-term
 financial goals of the school.
- Work with each school department to provide transparent and proactive financial reporting, planning, and budgeting processes that build trust among administrators, faculty, staff, students, alumni, parents, and trustees.
- Develop treasury and investment policies to support the financial sustainability of the school's academic programs, faculty compensation, and tuition assistance models.
- Develop multi-year capital improvement budgets, forecasts, maintenance schedules and other operations plans and projects to meet the evolving needs of the school.
- Oversee and ensure the successful completion of the annual independent audit.

Operational Oversight & Compliance

- Ensure successful performance of several operational functional units and programs, including: human resources; facilities; dining services; reception, and security and safety.
- Proactively communicate with department leadership to ensure that teaching, learning, and all other aspects of the school's program, as well as scheduled events, are adequately supported by the school's operating procedures.
- Establish policies, systems, and procedures that are harmonious with school culture to ensure effective operations and improve operational efficiency.
- Provide leadership and expertise in evaluating current local, state, and federal regulatory requirements and ensuring compliance with those regulations for all school policies and procedures.
- Oversee risk management, insurance, vendor contracts and agreements, and leases, and seek to support equitable and inclusive business practices and relationships.
- Collaborate with the head of school, HR manager, dean of faculty, and other senior administrators to provide leadership regarding employee compensation and benefits.

General Leadership

- Supervise a team of finance and operations staff, and evaluate and ensure that institutional and business office staffing levels and budgets are sufficient to meet the ongoing needs of the organization.
- Provide ongoing leadership and professional development opportunities for direct reports, while sustaining a positive, productive, and supportive team culture.
- Serve as the primary liaison to the following board committees: Finance, Risk & Audit, Investment, Stewardship, and Retirement Plan Subcommittee.
- Participate as a collaborative member of the leadership team, and serve as a trusted advisor to the head, leadership team, and board of trustees.
- Report directly to the head of school and perform other duties as assigned.



Qualities & Qualifications

Professional Qualifications

- Bachelor's degree required; Master's degree or MBA preferred
- 7+ years of experience in finance and/or operations leadership
- 5+ years of team leadership experience, including supervising managers or directors, preferably in an educational, not-for-profit, or mission-aligned organization
- High proficiency using technology for financial analysis, operations management, modeling, and reporting; experience with Blackbaud's Financial Edge desired but not required
- A comprehensive skill set for oversight of financial reporting, budgets, investments, accounting, facilities, HR, food service, contracts, risk management, and security

Personal and Leadership Qualities

- Exceptional communication and relationship-building skills, including the ability to work with board members and school leaders to contribute positively to organizational morale
- Broad-based analytical, problem-solving and leadership capabilities, and an ability to contribute strategically in areas beyond finance and operations
- The ability to establish, implement, and maintain operational policies, procedures, controls and standards in a complex environment with multiple demands and on time and attention
- A demonstrated commitment to diversity, equity, and inclusion, and an understanding of diverse cultures and experiences and an awareness of implicit bias
- A smart and confident decision maker who operates with exceptional integrity and authentic empathy, warmth, and collegiality
- An ability to create and maintain positive, supportive, and trusting relationships with individuals from diverse backgrounds and perspectives
- A listener who analyzes complex situations and helps build consensus to solve problems
- An analytical, detail-oriented, organized, and passionate approach toward process improvement and financial and operational project management
- An ability to work under pressure, plan personal workload and delegate effectively
- A willingness to fully participate in the life of the school, which may include attending occasional after-hours or weekend events



How to Apply

12M & Ed Tech Recruiting is acting on behalf of Lick-Wilmerding High School to identify exceptional finance and operations leaders to fill this extraordinary opportunity. Direct inquiries to:

jobs@12MRecruiting.com

Applications submitted by **February 23, 2025** will receive priority review

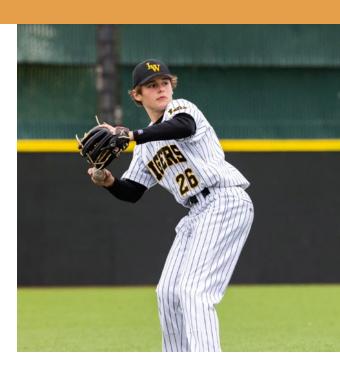
All applications must be submitted online:

www.12MRecruiting.com/jobs/LWHS/CFOO

An application requires submitting four PDFs:

- Cover letter introducing yourself to the Lick-Wilmerding High School search committee
- 2. 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)
- 4. A response to the following prompt:

In 250 words or less, please describe 3-5 guiding principles you use in your approach to financial and operations leadership.



LWHS is an equal opportunity employer. We value a diverse workforce and an inclusive culture. LWHS encourages applications 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.



