

LIVE OAK SCHOOL



DIRECTOR OF FINANCE

LOCATION

San Francisco, CA

POST DATE

May 13, 2024

PRIORITY DEADLINE

June 9, 2024

SEMIFINAL ROUND

Early-to-mid June

ON-SITE FINAL ROUND

Mid-to-late June

DECISION ANNOUNCED

Early July

REPORTS TO

Head of School

SALARY RANGE

\$240,000 – \$270,000

START DATE

Summer 2024



SUMMARY

Live Oak School, a K-8 independent school in the heart of urban San Francisco, believes that the best learning happens when students are actively engaged in the process — thinking deeply, exploring ideas, and trying on strategies for solving problems. The school's approach to teaching and learning is deeply rooted in progressive tradition and informed by contemporary research.

Live Oak anchors its instructional program around the students as individual learners, determined to prepare them for the opportunities that will define the lives of graduates in the twenty-first century.

The finance office at Live Oak is an essential business unit, comprising three people: a director of finance, and two full-time staff positions reporting to the director: a controller and an employment resources manager. In addition, the facilities department, which is outsourced to a third-party management company, rolls up to the director of finance. At a school like Live

Oak, all administrators serve both strategic and hands-on functions, and they lean into opportunities to support and engage the academic program. Live Oak is led by an outstanding, highly respected, dedicated, and mission-centered head of school, who has worked at the school since 2001 and served as its head since 2009.

Live Oak School now seeks a director of finance to oversee all aspects of the school's finance and budget management, human resources, and facilities. The director is a member of the head of school's strategy steering team and has frequent touch points with the board of directors via three standing committees. Five years ago the school nearly doubled in physical size and student enrollment. Many leaders at the school have already started to imagine further expansion via real estate acquisition, for which the director of finance would be an essential partner. Live Oak School looks forward to welcoming the next director of finance later this summer.



MISSION

Live Oak School supports the potential and promise of each student. We provide a strong academic foundation, foster skills to effect change, and develop courageous and conscientious learners from all backgrounds. We inspire students to advance equity and inclusion, to act with compassion and integrity, and to pursue a lifelong passion for learning.



HISTORY



In 2021, Live Oak celebrated its 50th year. Founded as a small progressive school in 1971, Live Oak has grown in size and place over the course of its history while remaining true to its founding commitment to child-centered pedagogies and inclusive community.

The school's first site at St. Francis Church in San Francisco's Balboa Terrace neighborhood gave the school its name. A live oak tree provided shade in the churchyard where students would play. The school first expanded its campus, enrollment, and programs at its site on Diamond Street in the Castro, but outgrew that site by 2001 when the school had grown from a K-6 to a K-8 and increased its middle school enrollment to two sections per grade.

In 2002, Live Oak moved into its current building at 1555 Mariposa Street in Potrero Hill adding dedicated spaces for art and music classes, a science lab, and a library. The school thrived on Mariposa Street as San Francisco's eastern neighborhoods were growing and demand for the school consistently outweighed its capacity. Driven to make a Live Oak education accessible to more students,

in 2014 the school began the nine-year expansion of enrollment and facilities to accommodate the addition of a class to every grade level, growing the lower school to two sections and the middle school to three sections.

Over the course of five years, the campus nearly doubled in size. The project included the addition of 12 new classrooms including a new middle school wing and commons area. This project also included the expansion of the school's library to double its size, the addition of a school kitchen to serve lunch to all students daily, and the opening of Live Oak's ChangeMaker Lab. The expansion project was ultimately completed when Live Oak's Rooftop Playground opened in November of 2019. The 6,000-square-foot expanse boasts beautiful views of San Francisco and includes a basketball court, an activities area, and a shaded picnic corner. Live Oak is thrilled by the lasting, positive impact that growth has and will continue to provide for the long-term health and well-being of the community and the school, while making a Live Oak education accessible to more families.



YOU NEED, THE WORLD NEEDS

We believe deeply in the symbiotic relationship between each individual and their communities — their school, their neighborhood, their city, and ultimately the whole world.

Our Mission and Values emanate out from that essential truth — helping the individual access everything that they need to flourish necessarily benefits the entire group, and practicing compassion for those around us necessarily benefits each individual.



VISION OF THE SCHOOL

To know a child well is Live Oak School's vision and the responsibility of the entire Live Oak community — faculty, parents, and the students themselves. In Live Oak's own words...

- We know children well, so we can teach them well, providing access and challenge for all students.
- We know them well, so they can bring their whole selves — all aspects of their identity — to school so they can be comfortable at school to take the risks that result in real learning.
- We know them well, so they can know themselves well, and grow into people who can advocate for themselves and for others.

VALUES OF THE SCHOOL

Live Oak promotes four values from the classroom to the boardroom:

- A rich curriculum that provides access and challenge for every student, supporting deep thinking, self-expression, and new perspectives;
- An inclusive school community that explores and appreciates the differences that define each individual;
- Empathy in personal relationships to encourage responsibility and integrity in the actions of each community member; and,
- Joy and humor, which in turn inspire a willingness to learn from mistakes, to take healthy risks, and to explore the curiosity of childhood.



KEY STATS



415
Total enrollment

7:1
Student to teacher ratio

51%
Students of color

53%
Faculty/staff of color

35-40
Extended care clubs and classes throughout the year

80+
Field trips attended from K-8 (including 8th grade trip to D.C.)

30
Fruit and vegetable plants in our community garden

35
Meal options served in the cafeteria each week

2024-25 Tuition
K-5th Grade: \$500 – \$43,815
6th-8th Grade: \$500 – \$44,395

25%
of Live Oak families participate in our Adjusted Tuition Program. Our Adjusted Tuition Program makes a Live Oak education accessible for families.

Relevant Associations & Memberships
National Association of Independent Schools (NAIS), California Association of Independent Schools (CAIS), California Teacher Development Collaborative (CATDC), People of Color in Independent Schools (POCIS), California Independent Schools Business Officers Association (Cal-ISBOA)

Accreditation
California Association of Independent Schools (CAIS)

www.liveoaksf.org



FIVE STRATEGIC DIRECTIONS

A yearlong, community-wide strategic planning process revealed five key strategic directions to extend the potential and promise of Live Oak School in new and exciting ways. The entire community is invested in the vision that emerging for the future of Live Oak.

1. INSPIRE EVERY LEARNER

Live Oak believes that human potential is richly diverse, that learning is a complex act, and that students take different paths as they secure new knowledge and understandings. Live Oak will continue to value a wide range of learners and nurture a growth mindset, while expanding its capacity to support each student's needs and help students follow their interests. The school will identify ways that its curriculum should evolve to provide broad exposure and opportunities for specialization.

Strategies

- Audit the scope and priorities of the curriculum, with a focus on course content in science, technology, and math disciplines
- Explore new ways to address learning differences and advanced learners
- Support students to make choices about their learning experiences
- Determine how to use the bounty of the Bay Area to expand classroom walls

2. ACTIVATE CHANGEMAKERS

Live Oak has always strived to support students' development of strong identities and equip them with skills to navigate complex social and societal issues. Now the school will build upon this foundation to create robust and deeply considered social-emotional and service learning curriculum. A Live Oak education will secure for students the full benefits of strong self-knowledge in the context of an affirming school community. A curriculum that challenges students to identify injustice and assume responsibility to affect change will deepen engagement with learning and provide the sense of meaning that is vitally important to well-being.

Strategies

- Reimagine Live Oak's social emotional and service learning curriculums, while reassessing the school's relationship with the ever-changing city of San Francisco
- Articulate a scope and sequence for K-8 social and emotional education that includes identity development, collaboration and leadership skills, and a service learning ladder that emphasizes meaningful engagement with the community and connections to broader curriculum
- Explore how Live Oak might more deeply participate in San Francisco life and engage changemakers already in the surrounding community



3. ADVANCE EQUITY, INCREASE DIVERSITY, & DEEPEN INCLUSION

Live Oak knows that the ideal learning environment for students is one filled with varied and multicultural perspectives, and that its community must reflect a diversity of race, ethnicity, gender identities, and positions on the socio-economic spectrum. An inclusive school community whose members possess a multitude of perspectives will offer students the ideal environment for learning about themselves, others, systems, and cultures.

Strategies

- Strengthen the school's commitment to enrolling and supporting students and families from communities traditionally underrepresented in independent schools
- Improve policies and practices to ensure all students experience a strong sense of belonging and see themselves reflected in the curriculum, the faculty, and the community
- In a city of increasing socio-economic disparity, be ever more intentional about ensuring that families at all points on the socio-economic spectrum feel fully included in the school's curriculum and community

4. PROMOTE THE LIVE OAK WAY

Live Oak's mission, vision, values, and school culture are deeply intentional, and its constructivist pedagogy demands the highest quality of student engagement, critical thinking, and development of relevant skills. By leading the conversation about the quality of a Live Oak education and the importance of the school's shared values—including the non-negotiable value of diversity and inclusivity—Live Oak will better unite its community in a shared understanding of what Live Oak offers and a commitment to maintaining its values over time.

Strategies

- Ensure that the power and promise of a Live Oak education are well understood
- Develop orientation programs for new faculty, students and families
- Create a parent education curriculum that connects parents to the core values and educational philosophy of the school
- Thoughtfully evolve school rituals and traditions to stay true to their purpose in light of the school's expansion
- Promote Live Oak in San Francisco and beyond as a provider of an exceptional education

5. SECURE ASSETS TO SUPPORT PRIORITIES

Live Oak's most valuable resources are the people who bring the school to life every day, and the greatest gift to future students is caring for the school well beyond the timelines implied in this plan. With a strong financial foundation Live Oak can continue to attract and retain the highest quality educators and provide students with the most enriching programs, while securing this vision for the Live Oak of the next decade and beyond.

Strategies

- Increase support for the highest quality educators so that their quality of life, professional and personal, can be prioritized in compensation and work environment practices
- Secure assets so that Live Oak can be nimble in the face of future opportunities for facilities and strategic projects that enhance the quality of programs, and be protected from unseen risks.



VOICES OF LIVE OAK

MAURICE "MO" HILL

Director of Enrollment
Management and Admissions



Maurice or "Mo" began his tenure with the Live Oak admissions office in July 2023. Mo comes to Live Oak from Cranbrook Schools outside of Detroit where he was most recently the Dean of Upper School Enrollment. His career has brought him to a variety of independent schools and higher ed institutions throughout the Midwest and East Coast, including Beaver Country Day School (Chestnut Hill, MA), Walnut Hill School for the Arts (Natick, MA), Worcester Academy (Worcester, MA), and Kenyon College. In addition to a range of admissions roles over the years, Mo has served as a dorm parent and a Black Student Union Advisor, demonstrating his passion for and commitment to opening access for transformative educational experiences like the ones he experienced growing up. Mo graduated from Wesleyan University with a degree in Sociology and African American Studies before earning his Master's in Private School Leadership from the Klingenstein Center at Teachers College, Columbia University. Mo looks forward to partnering with the director of finance on enrollment and tuition strategies to support the long-term success of the school.

TANYA SUSOEV

Middle School Head



Tanya Susoev was born and raised in San Francisco. She identifies as a biracial, first-generation Asian/Korean-American, and first-generation college graduate. This identity has guided and grounded her practice in storytelling and celebration of student/colleague identities and reflective practice. Tanya's teaching career began in San Diego, teaching for two years before returning to the Bay Area and continuing in the classroom for an additional eight years. During that time, she also served as a swim coach, club moderator, DEI committee leader, director of service-learning, and union representative. Tanya earned her Administrative Services Credential and M.A. and Ed.D. in Educational Leadership from Mills College, completing her research and dissertation on white identity and supremacy in schools. Prior to joining Live Oak School, she served three years as a high school associate principal. Tanya looks forward to welcoming the incoming director of finance as an important strategy partner, as the school explores new academic leadership structures for the 24-25 school year.

EDIE ALEJANDRE

Operations Manager



Edie is originally from Mexico but immigrated to San Francisco at the age of 3 and has lived here since. She earned her Bachelor's Degree in political science from San Francisco State University. Edie worked in the newspaper industry for 15 years and changed career paths to work in administration in the educational field. Before coming to Live Oak, she worked for seven years at Marin Prep/Sí School and then Terra Marin School in Mill Valley. Edie's role is essential to help the school manage and oversee a variety of different operational domains. She looks forward to partnering with the director of finance on projects such as exploring new transportation offerings, and finding ways to maximize campus space usage for the school's many programs and classes.



AREAS OF OVERSIGHT

Finance

With an operating budget of approximately \$16M, Live Oak School is in an outstanding financial position. Just over five years ago, the school completed the expansion of its physical footprint and nearly doubled enrollment, giving the school more resources and space to operate its outstanding program. The director of finance and the other two members of the business office (a controller and an employment resources manager) play an essential role in managing all business functions, from day-to-day policies, processes, purchasing, and billing, to human resources affairs, to annual budgeting, forecasting, and strategic planning.

Facilities Management

While some areas of school operations, such as dining services and front-desk supervision, fall under the purview of the school's operations manager, the director of finance oversees the school's facilities department. All facilities services are outsourced to Hines Building Management (HBM). The director of finance supervises the lead facilities manager, a dedicated HBM employee who is on site all day every day, and who in turn supervises the facilities crew supporting maintenance, custodial, event, and other physical plant services. As the operations manager's role evolves and expands, there will be additional opportunities for the director of finance to partner with that key position.

Board Committee Support

The director of finance is the lead liaison to three board committees: Finance, Audit, and Building and Grounds. Live Oak board members are engaged and invested in the school's success, bringing a wealth of knowledge and professional experience in all areas of finance. They look forward to partnering with the next director of finance on leading the school's long-term financial strategy. The board seeks a director of finance with outstanding acumen and attention to detail in areas such as investment strategy, cash management, debt financing, and financial modeling, and they would welcome someone with real estate acquisition experience.

Program Expansion

While the campus expansion project nearly doubled both the school's enrollment and physical footprint, Live Oak is still in need of a gymnasium and performing arts space to call its own. The director of finance will be instrumental in considering creative solutions to addressing the need for additional campus space, which may include future capital projects and real estate acquisition. Likewise, as there is still a portion of the school building that Live Oak rents, the director will need to consider how to best leverage the school's assets should the opportunity arise to purchase the remaining space.



VIRGINIA PAIK
Head of School

Virginia Paik is in her fifteenth year as Head of School at Live Oak School in San Francisco. During her tenure at the school, she has led mission-driven change to evolve the educational program, to expand the school's enrollment and facilities, and to develop administrative practices that advance inclusivity. Virginia has served on the Boards of CAIS, CATDC, Redwood Day School, The Bay School, and is currently a trustee at St. Paul's Episcopal School. She holds a BA from Pomona College and an MA from Teachers College, Columbia University. She also has the pride and privilege of being an independent school parent.

We invite you to watch our [interview with Virginia](#), in which she discusses the diverse and dynamic community at Live Oak, her vision for the next chapter of the school, and the important priorities and opportunities ahead for the incoming director of finance.



DUTIES



Finance, HR, and Facilities

- Partner with the head of school to provide advice and support on issues of finance, facilities management, risk management, debt management, governance, legal issues, and human resources.
- Provide strategic direction for appropriate and maximum use of financial resources to achieve the school's strategic priorities and maintain long-term health of the institution.
- Maintain budgets and financial reports related to capital projects and long-term facilities maintenance, including planning and supervising major construction projects.
- Oversee all human resources functions and campus facilities, including contracts and partnerships with external vendors.
- Partner with the operations manager to ensure ongoing facilities and budgetary support of campus expansion projects.

Compliance, Risk Management, and Reporting

- Prepare and maintain reports for the head of school and board of trustees on financial planning, external reporting, industry benchmarking and analysis, debt management, and capital projects.
- 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 through a comprehensive risk management program, and lead all campus safety initiatives.
- Manage the school's 403(b) plan and ensure compliance with human resources policies.

General Leadership and Administration

- Supervise the controller and employment resources manager, and manage external facilities vendor contracts and employees.
- Serve as lead liaison for the finance, audit, and building and grounds committees of the board of directors, and provide effective communication, presentations, and updates to the full board.
- In partnership with the director of enrollment management and admissions, serve as a member of the adjusted tuition committee and oversee all adjusted tuition applications.
- Participate as a collaborative member of the strategy steering team and serve as a trusted advisor to the head, other senior administrators, and board of trustees.
- Report to the head of school, and perform other duties as assigned.



QUALIFICATIONS & QUALITIES

Qualifications

- Bachelor's degree required; MBA, CPA, graduate-level coursework, or other professional certifications preferred
- Proven success as a financial leader, preferably in a nonprofit organization
- Comprehension of risk management and current legal and regulatory environment within the context of non-profit organizations and/or independent schools
- Demonstrated expertise in developing and using financial models for forecasting, budgeting, strategic planning and analysis
- Experience in setting up and maintaining financial and operational policies, procedures, controls, and standards, and preparing GAAP financial statements
- Robust knowledge of human resource administration and regulatory requirements



LIVE OAK SCHOOL IS LOOKING FOR CANDIDATES WHO ARE...

DETAIL-ORIENTED
KNOWLEDGEABLE
STRATEGIC
PROACTIVE



RESOURCEFUL
COMMUNICATIVE
ETHICAL
RELIABLE

you got
this

Professional and Leadership Qualities

- Capacity to collaborate effectively with a wide range of constituencies, including parents, faculty and staff, trustees, members of the neighborhood community, and vendors
- An analytical and organized approach toward process improvement, financial management, and decision making
- Exceptional attention to detail and integrity
- Demonstrated quantitative and analytical skills in support of projecting, developing, and managing capital and operating budgets
- Outstanding communication, both written and verbal
- A genuine belief in Live Oak's mission and an excitement to join a supportive community as a key strategic partner to the head of school and other senior administrators



HOW TO APPLY

12M Recruiting is acting on behalf of Live Oak School to identify exceptional financial leaders to fill this extraordinary opportunity. Please direct any inquiries to: jobs@12MRecruiting.com



Applications submitted by June 9 will receive priority review.

All applications must be submitted online:

www.12MRecruiting.com/jobs/LiveOak/Finance

- Cover letter introducing yourself to the Live Oak School search committee
- CV or résumé
- 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:

Live Oak is a progressive school with an unwavering commitment to equity, inclusion, and belonging. Everyone at the school, in both academic and operational departments, works in service to issues involving DEIB. In 250 words or less, talk about how you as the director of finance would see and seek opportunities to contribute to these fundamental values of Live Oak.

