**Chief Financial Officer**

**Role Description**

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| **QUALIFICATIONS:** | 1. Bachelor’s and/or Master’s Degree in Accounting or Business Administration. 2. Prior educational administration experience. 3. Proficient in both English and Spanish (Preferable). |
| **REPORTS TO:** | The Chief Financial Officer reports directly to the President. |
| **JOB GOAL:** | The Chief Financial Officer is responsible for directing the financial and risk management operations of the School, to include ongoing development and monitoring of financial and operational strategy and control systems designed to preserve School assets and report accurate financial results in accordance with generally accepted accounting principles (GAAP) issued by the Financial Accounting Standards Board and other regulatory organizations, as well as, the principles and teachings of Jesuit Education. |

**RESPONSIBILITIES**

1. Member of the President’s Council.
2. Ex-officio member of the Finance Committee of the Board of Advisors.
3. Ex-officio member of the Financial Assistance Committee.
4. Develop, implement, direct and evaluate the School’s fiscal operations.
5. Develop, implement, direct and evaluate the School’s human resources operations.

**FUNCTIONS**

1. Enhance or develop, implement and enforce financial policies and procedures of the school through systems that will improve the overall operating effectiveness and efficiency of the school.
2. Implement a zero-based budgeting system across the different departments and operational areas of the school.
3. Analyze past expenditure patterns and projects budgetary expenses.
4. Establish a process for each department and program to prepare their budget.
5. Meet with the Principal, Director of Plant Operations, Director of Technology, and Executive Director of Advancement and Alumni Relations for approval of departmental and program budgets.
6. Prepare and present the school budget to the President, Administration, and Finance Committee after reviewing the needs by department and program with appropriate personnel.
7. Provide approved budgets to department and program directors.
8. Oversee monthly budget compliance and communicate with budget department personnel.
9. Provide monthly budget variance reports to the President and the Finance Committee of the Board of Advisors.
10. Supervise activities of accounting and human resources personnel including:
    1. Assure proper timely reconciliation of all accounts for adequate financial reporting;
    2. Analyze receivables and follow up on unpaid balances;
    3. Assure proper processes are in place for the accurate recording of assets on the school’s accounting records upon purchase or construction, and the proper recognition upon disposal;
    4. Assure the proper recording of school expenses and payments;
    5. Supervise the administration of the Financial Assistance Program;
    6. Maintain salary records, administer benefits program, prepare annual contracts, and review faculty and staff salaries and benefits with the President.
    7. Coordinate benefit program for all employees insuring compliance with ERISA and the School’s published retirement plan.
11. Perform all duties related to the administration and maintenance of Endowment Fund income and its allocation.
12. Evaluate and advise on the impact of long-range planning, introduction of new programs, and financial regulatory actions.
13. Annually prepare a report of the Key Performance Indicators (KPIs), utilizing the 18 Marks of Excellence and provided by the Institute of School Management.
14. Advise, from a financial perspective, on any contracts into which the school may enter.
15. Work with the Finance Committee of the Board of Advisors for continuing review of school’s investment portfolio.
16. Respond to inquiries associated with the annual audit conducted by an independent accounting firm.
17. Oversee the school’s insurance programs.

**EVALUATION**

The Chief Financial Officer will be evaluated annually by the President. The evaluation will be based on the Chief Financial Officer’s self-evaluation, the Characteristics of Jesuit Education, and the responsibilities listed above.