



HERITAGE HALL

Director of Finance

July 1, 2024

Or as soon as the right person is found

1800 NW 122nd Street
Oklahoma City, OK 73120
www.heritagehall.com



The
Education
Group

The School



Heritage Hall is a co-educational college preparatory school of approximately 965 students in northwest Oklahoma City offering a challenging academic curriculum for students in grades Preschool - 12. Heritage Hall has become synonymous with educational excellence in OKC and nationally, with its numerous National Merit Scholars, Presidential Scholars, academic and debate programs, Cum Laude Society membership, acclaimed performing arts program, and many state athletic championships.

Heritage Hall attracts students with intelligence, character, creativity, curiosity, and an eagerness to learn. These students are supported by a skilled, caring faculty and administration, and they are embraced by a professional culture built on trust and collaboration. Students thrive in this vibrant, challenging, and welcoming environment. The school culture is enriched by an educational philosophy that encourages kindness, truth, and service to others. As early as preschool, students affirm the values of diversity, mutual respect, and social responsibility. Service is an integral piece of the Charger experience.

The School recently completed a Strategic Plan focusing on academic and faculty excellence, character and wellbeing, diversity and inclusion, and institutional advancement. The next Director of Finance will carry forward these visions and goals by working with the school president, the board, the faculty, and alumni.

Governed by a 15-member Board of Trustees, Heritage Hall has a \$19M annual budget and employs over 200 diverse and talented teachers, administrators, support staff, and coaches.



*"To inspire in each child the curiosity to Learn,
the self-confidence to Lead,
and the compassion to Serve."*



The Position



Director of Finance

Start Date: July 1, 2024 (or as soon as the right person is found)

Heritage Hall is seeking a Director of Finance who will have primary responsibility for managing and facilitating Business Office functions. The Director of Finance reports to and works closely with the President, is a member of the Leadership Team, and serves as an administrative liaison to the Board of Trustees' Finance Committee.

The Director of Finance is responsible for all financial functions of the School, ensuring compliance with accounting and reporting standards. This vital senior leadership team member manages all aspects of the day-to-day business office operations, oversees payroll processing and other administration functions, and stewards the School's assets. Through thoughtful and strategic leadership, this position implements best practices associated with accounting, finance, and administration by maintaining up-to-date knowledge of relevant business, educational, and technology trends while effectively supervising, guiding, and developing staff. In partnership with the President, the Director of Finance develops and maintains relationships with banks, professional accountants, legal counsel, and insurance companies.

The Director of Finance serves the entire Heritage Hall community, providing leadership, support, and collaboration in the following ways:

- Leads the Business Office staff which currently includes a Controller, Student Billing Coordinator, and Payables Manager;
- Collaborates with Division Heads in the Lower, Middle, and Upper Schools;
- Works closely with the Vice President, Director of Operations, Director of Admissions, Director of Development, and the Athletic Director;
- Serves as the administrative liaison to the Board of Trustees Finance Committee and is available as needed for other Board committee service.



Attributes & Qualifications



- A financial controller who oversees all accounting functions, provides direction and supervision to staff, and develops and maintains a robust system of internal controls while ensuring that the accounting office complies with relevant standards and Trustee directives;
- An insightful administrator who develops the annual operating and capital expenditure budgets, presents and interprets these budgets to the Leadership Team, the Board of Trustees, and appropriate staff, and provides monthly updates regarding performance against budget;
- A diligent accountant who monitors the ongoing status of the school's finances, analyzes the financial status, and produces cash flow projections in order to alert the president to any financial or budgetary concerns;
- A fastidious collaborator who leads the annual external audit;
- A practical producer who ensures timely (monthly) and accurate financial reporting for board and committee meetings, in a clear and concise format to assure board and management comprehension;
- A detail-oriented manager who develops and implements a balance sheet reconciliation system that is timely, thorough, accurate, auditable, and supported by appropriate documentation, with particular attention to fundraising and tuition activities;
- A key point person who is responsible for vendor contracts, leases, and all bank relations and tracks contracts to monitor financial liability, termination clauses, and expiration dates, while handling 1099 reporting as needed;
- A punctual preparer who ensures timely reporting of all financial data, including, but not limited to, any applicable tax reporting, grant reporting, and required financial reporting to funders;
- An intentional auditor who oversees property and fixed assets and maintains a physical inventory of fixtures and equipment;
- A prudent leader who guides, develops, and implements accounting and finance-related strategic initiatives and action plans that align with the School's strategic plan;
- A deliberate generator who ensures timely and accurate completion of all payroll processing;
- A conscientious overseer who manages School payables activity, ensuring compliance with the system or internal controls;
- A compassionate authority who recognizes the value of approaching tuition collections with a consistent and professional but also caring attitude;
- An astute visionary who continually strives to improve departmental functions, create efficiencies, find solutions, and recognize the future of not-for-profit accounting technologies and trends.

Requirements

- Bachelor's degree required;
- CPA designation preferred;
- Minimum 5 years of financial management experience; cash flow modeling and systems implementation experience preferred; experience overseeing a finance function of at least \$15-20M preferred;
- High professional and ethical standards for handling confidential information;
- Extensive experience working with, supporting, and reporting to Boards and Committees;
- An understanding of and experience with independent schools and/or non-profits, especially their philosophy and operations;
- Strong knowledge of Blackbaud accounting and fundraising systems, or similar accounting programs;
- Strong verbal and written communication skills, including the capacity to compose professional written correspondence;
- Complete command of all steps in the accounting cycle;
- Capable of thinking on an analytical level and interpreting financial reporting, drawing on strong mathematical skills;
- Strong leadership and interpersonal skills and capacity to motivate and inspire staff at all levels of the organization;
- Reflects appreciation for the cultural background, heritage, and identity of all persons involved with the School;
- Ability to exercise good judgment, courtesy, and tact in dealing with the public, in giving and obtaining information, and in dealing with problems as they arise;
- Organizational and time management skills



Why Heritage Hall?



- Make an impact on the lives of young people as a member of an enthusiastic and encouraging community of educators;
- Engage in meaningful work in a secure workforce with supportive colleagues;
- Experience work-life balance in a compassionate workplace strengthened by generous time off.

Heritage Hall offers generous health/dental/vision plans, group life, long-term disability, voluntary life and short-term disability plans, 403(b), and flexible spending accounts. Heritage Hall is well-regarded for its exceptional educational and extracurricular programs and esteemed faculty and staff. Being a member of our school community can be a personally and professionally fulfilling experience. We are committed to creating a community of faculty and staff as rich and diverse as the world around us. Our inclusive environment fosters open communication, deep collaboration, and instructional freedom and is backed by strong administrative support and professional development opportunities. As one grows, we all grow. 98% of Heritage Hall employees surveyed would recommend our school to other gifted educators.

Heritage Hall currently uses the following technology systems: Blackbaud (admissions, development, communications, student information system, tuition management, and accounting platform), SSS by NAIS (financial aid), Paycom (payroll, benefits, time and applicant management), and Authorize.net (payment processing). The organization uses Microsoft Office and G Suite products for its enterprise cloud server and related productivity tools.

Salary will be commensurate with experience and includes a generous benefits package.



How to Apply



Heritage Hall is an equal opportunity employer that values diversity. Heritage Hall offers competitive compensation packages and benefits. The School is committed to being helpful to partners seeking professional opportunities in the area as needed.

Prospective candidates should send the following materials in a single PDF document to the search consultant:

- Letter of interest specifically addressing this position and school
- Resume (education and work experience)
- List of five professional references with contact information

Candidates will be evaluated as materials are received.

Contact The Education Group



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Consultant

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