



# CATLIN GABEL SCHOOL

Chief Finance and Operations Officer

## Summary

**LOCATION** | Portland, OR

**POST DATE** | October 26, 2022

**APPLICATION DEADLINE** | December 4 at 5:00pm PST

**REMOTE SEMIFINAL ROUND** | Mid-December

**ON-SITE FINAL ROUND** | Week of January 2

**DECISION ANNOUNCED** | January 16, 2023

**START DATE** | January 30, 2023, or later by mutual agreement



## SUMMARY

In the southwest section of Portland sits a premier independent school with both an outstanding reputation and an exciting future. Catlin Gabel has been educating preschool through grade 12 students since 1957, and the two schools that merged to form Catlin Gabel have nearly 100 years of history before that. This progressive institution that runs on an old family farm is a true diverse and inclusive community, with more than 50% students of color. The main campus comprises approximately 70 acres, and the school recently purchased an eight-acre campus just three blocks away that housed a former art college. With this acquisition comes an exciting array of possibilities for Catlin Gabel to expand its program, services, and facilities. On that note, the school has just begun a \$30M campaign that will yield a thriving community center for athletics and wellness and add funds to the endowment. In the future, the school will likely undertake additional campaigns to support facility renovations as well as new construction.

Now, Catlin Gabel seeks a chief finance and operations officer (CFOO), reporting to the head of school, to play a critical role for all these major undertakings. On a day-to-day basis, the CFOO oversees three critical finance and operations units--the Finance Department, the Facilities Department, and the Technology Department--each of which has an experienced leader at the helm. Between all that, the CFOO works collaboratively with other leadership team members, including two assistant heads of school, and helps to ensure continued operational improvement across this complex campus. The CFOO also works closely with the head and the board on financial strategy, planning, and analysis. The school hopes to onboard its next CFOO by late January of 2023, to allow for a graceful transition of leadership.

## MISSION

Catlin Gabel fosters compassionate and curious citizens of the world by inspiring in every student a love of learning and the courage to take responsible action.





## EDUCATIONAL PHILOSOPHY

Catlin Gabel is a catalyst for lifelong learning. We fuel curiosity with courage to prepare our students with the confidence and ability to advocate for themselves and others, so they can rise to the challenges of life and change the world for good.

We foster in every student a wellspring of curiosity, courage, and empathy—three characteristics that cultivate a lifelong love of learning. Because we champion an experiential model of learning in which education is based on experience, students encounter valuable lessons in real-world settings. And our commitment to progressive education doesn't stop at our students, it extends to the school itself, as we continually adapt what we do to enhance the learning experience and motivate individual growth and success.

## CORE VALUES

### Integrity

We hold ourselves to high standards, both in the way we work and in the way we interact with each other. We believe that we are at our best when we are honest with ourselves and others. Our aim is to give students the freedom to explore their own core beliefs, then test and revise them—all within the context of a supportive environment.

### Inclusion

We are stronger when we lean into our differences, when we not only listen to each other and explore assumptions but when we create space for new ways of thinking and understanding together. A community of diverse learners with different perspectives and life experiences is essential to deep learning and cultural competence in a global society.

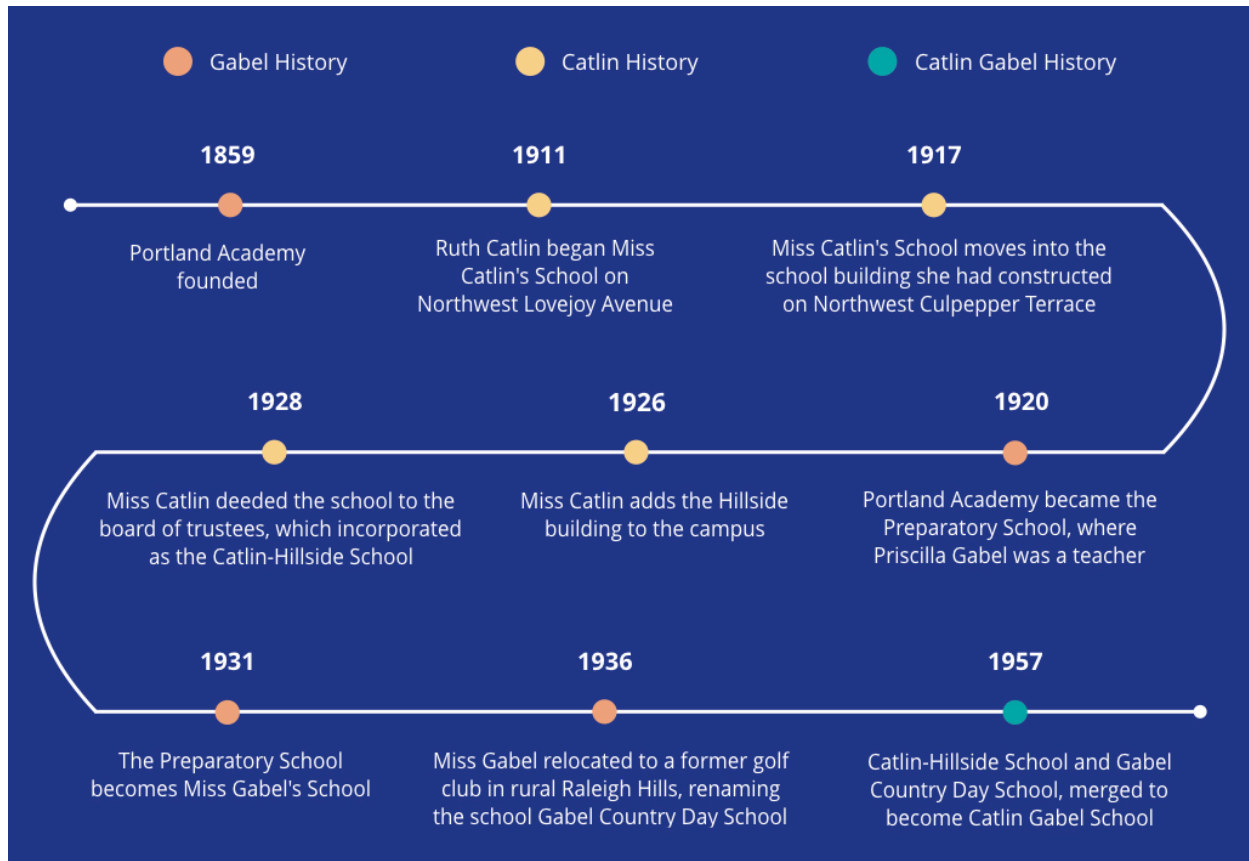
### Kindness

We are committed to stewarding positive relationships with each other and the natural world. By treating every person with respect that we each deserve, we can encourage the development and growth of every person. By practicing and teaching sustainable practices, we as a school and as individuals can help protect our environment for future generations.





# HISTORY



Two schools, Catlin-Hillside School and Gabel Country Day School, merged in 1957 to become Catlin Gabel School. The Upper School relocated to the current campus on Barnes Road in 1958, with other divisions added in stages over the following decade. Our predecessor schools were founded by women who were leaders in the progressive education movement.



*A true education involves more than formal development of the mind alone—it must develop the whole nature of a young human being to the utmost of his [or her] individual capacity.*

PRISCILLA GABEL, CIRCA 1946



*To maintain a school with the most enlightened ideals of education, content of work and methods of teaching, where each pupil is the unit of consideration, under conditions which will serve to develop his [or her] fullest powers as an individual and as a group member.*

RUTH CATLIN, 1928





## PRINCIPLES OF PROGRESSIVE EDUCATION

Catlin Gabel School was founded on four principles of progressive education, which remain the foundation for teaching and learning across all divisions and grades.



### Inquiry Based

Inquiry based education incorporates student questions, fosters curiosity, and fuels the desire to keep learning. It's based on the belief that asking good questions leads to success and happiness more than having all the answers.

- Creative, multiple perspectives, and original thinking
- Generative (students generate questions and paths to pursue them)
- Iterative process through which students learn
- Reflective (analyze outcomes and process, incorporate into next learning cycle)

### Educating for Democracy

Educating for democracy equips students with the mindset and skills to increase their self-awareness and understanding of complex issues, with the goal of taking responsible action in their communities.

- Creative, multiple perspectives, and original thinking
- Generative (students generate questions and paths to pursue them)
- Iterative process through which students learn
- Reflective (analyze outcomes and process, incorporate into next learning cycle)
- Fostering empathy and awareness of others, including those with differing experiences and viewpoints
- Developing a sense of agency and voice
- Building the knowledge and skills necessary to be informed, participatory, and engaged community members
- Engaging in discourse about power and privilege



## Teaching the Whole Child

Teaching the whole child means knowing and nurturing individual children and designing learning opportunities that honor and develop their full identities so they can thrive now as children and grow into happy and fulfilled adults.

- Teacher curiosity and interest in students' whole selves
- Children and families are known and valued
- Safe and trusting relationships are nurtured
- Differentiated and responsive approaches with opportunities for student-directed learning
- Children are represented in the curriculum, in the classroom, and in the adults on campus
- Growth and support of students' physical, emotional, academic, ethical, and interpersonal skills is cultivated
- Opportunities are provided for children to learn in a variety of settings and modalities

## Experiential Learning

Experiential learning is a process by which students learn through a cycle of direct experience, reflection, analysis, and experimentation. It encourages deep learning, inspires personal growth, and promotes active citizenship.

- Student-directed, teacher-guided, student-choice
- Students apply knowledge and skills
- Trial and error, and failure as part of the learning process
- Authentic purpose and meaning-making in real world context
- Rubric and demonstration-based assessments
- Opportunities to reflect and make sense of the experience





## STRATEGIC INITIATIVES

The Catlin Gabel Strategic Plan emerged from an inclusive, collaborative process in which community members worked together to imagine what our students will need in the years ahead. This bold vision for the school is based on three main objectives: Deepening our commitment to experiential learning, becoming an unrivaled educational laboratory, and reaffirming our commitment to excellence.

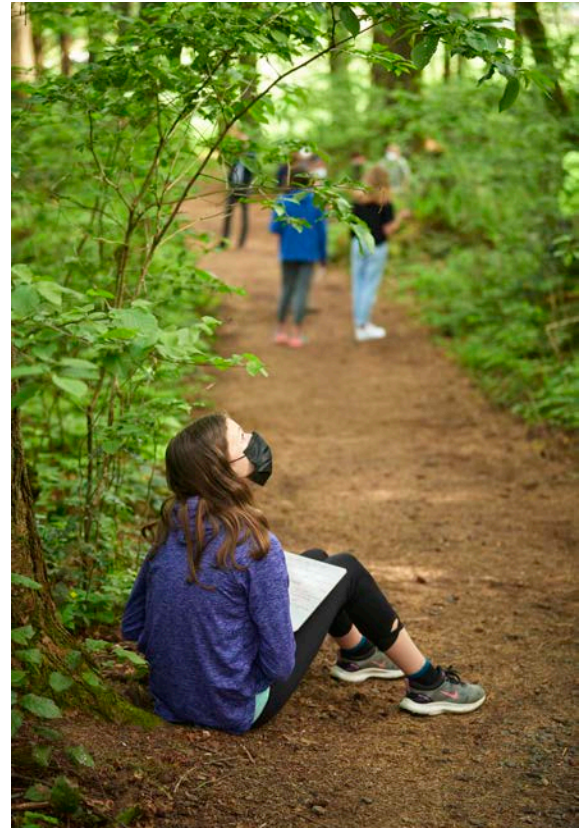
### Imagining Our Future

We focus on providing every student with a top-tier academic education. Our plan is to maintain and build upon this excellence for generations to come. We'll accomplish this by concentrating on improvement, rather than focusing merely on change.

### Experiential Learning

Experiential Learning is a process by which educators engage students through a four-step, iterative cycle of direct experience, reflection, analysis and experimentation. It encourages deep learning, inspires personal growth and promotes active citizenship. Those four steps include:

- **CONCRETE EXPERIENCE:** Engaging Directly in a Practical or Actual Situation
- **REFLECTIVE OBSERVATION:** Noticing what happened and relating to past experience and conceptual understandings
- **IDEA DEVELOPMENT:** Interpreting new knowledge with creativity and abstract thinking
- **ACTIVE EXPERIMENTATION:** Making connections, forming hypotheses, and applying understanding to new experiences



### Education Laboratory

Catlin Gabel has long envisioned itself as an educational laboratory, a dynamic school in which teachers and students pursue learning with creativity and purpose. That spirit has led to an engaging curriculum and extraordinary programs.

### Commitment to Excellence

Catlin Gabel is committed to progress, and our foundation of educational excellence makes that possible. While we adapt to changing needs of students and educators, we continue to provide a student-centered experience, a stimulating environment, and a faculty and staff as talented and creative as any in the nation.

We invite you to learn more about Catlin Gabel's strategic initiatives (<https://bit.ly/3fRRCdN>).



## EQUITY & INCLUSION

At the core of a Catlin Gabel education is the belief that every student should feel known, heard, and valued. We are committed to and value community-wide diversity and inclusion, as we believe students learn best in an atmosphere where multiple perspectives are upheld.

### Strategic Inclusion Plan

At Catlin Gabel, we have long understood the importance of diversity. In 1928, founder Ruth Catlin wrote that having “students of the school represent a cross-section of American life” was essential to preparing graduates for democracy. We know now that diversity alone is not enough to ensure educational excellence; we also must strive to be equitable and inclusive if we are to achieve our mission and live by our values. To that end, we define “diversity” as the range of differences in our community; “equity” as individuals receiving what they need to enjoy access, opportunities, and a fair chance to succeed; and “inclusion” as active engagement that supports every community member’s identity and sense of belonging.

Over the last two years, Catlin Gabel has received feedback that has identified areas of immediate need from historically-marginalized and underrepresented community members. Last year, the school announced a vision towards becoming an antiracist institution. In an effort to make progress on our inclusive vision and increase institutional accountability, the school has developed the following three-year Strategic Inclusion Plan. The Plan focuses on several priority goals that will positively influence all DEI efforts at the school. This plan is not intended to include all of the school’s DEI work in any given year, and prioritizing these goals does not mean other DEI work stops. We are highlighting these goals to ensure progress and institutional accountability in specific areas.

#### GOAL 1: EDUCATION

Ensure that the curriculum, teaching methods, and school culture reflect our commitment to diversity, equity, and inclusion.

#### Desired Outcomes (by the end of the school year 2023-2024):

- All faculty are engaged in ongoing professional learning to effectively develop and employ equity-based and antiracist instructional methods and materials
- Baseline expectations of equity-based teaching competencies are defined and teachers have support to achieve them
- The curriculum reflects diverse identities and experiences, including developmentally-appropriate lessons about equity and privilege in society

#### FOR MORE INFORMATION...

We invite you to learn more about Catlin Gabel’s Strategic Inclusion Plan (<https://bit.ly/3fQlQqd>), which paints a complete picture of Catlin Gabel's commitment to diversity, equity, inclusion and belonging principles.





## GOAL 2: COMMUNITY VOICES

Ensure that the school's decision-making processes reflect our commitment to include community voices and experiences and inspire engagement, understanding, and action.

### Desired Outcomes (by the end of the school year 2023-2024):

- An inclusion and belonging assessment tool for students, families, and employees leverages multi-year data to inform institutional decision-making
- Expectations and consequences regarding behaviors, comments, and actions that demean individual and group social identities are clarified and communicated
- Annual Report and community data indicate progress toward goals and inform action steps for the next Inclusion Plan

## GOAL 3: COMMUNITY MEMBERSHIP

Increase the school's student and employee diversity and provide increased access and influence for underrepresented groups.

### Desired Outcomes (by the end of the school year 2023-2024):

- The enrollment outreach plan results in increased Black/African American, Latinx/Hispanic, and Native American student representation
- The racial/ethnic diversity of faculty, staff, and administrators increases through improved recruitment, hiring, onboarding, and retention practices
- The Board of Trustees membership and leadership reflect the school's diversity commitment
- Effective structures are in place for student, parent/guardian, and employee affinity groups to build community and voice concerns and needs to the school





# MAJOR PROJECTS ON THE HORIZON

## Eagles Soar: A Campaign for Catlin Gabel

Catlin Gabel School is built on its compelling mission and values, bold vision, and commitment to student success. As part of the school's dedication to its students and community, Catlin Gabel is embarking on its most comprehensive campaign to date: Eagles Soar. This campaign will move the school into the future, as well as benefit the entire Catlin Gabel community, from the youngest students to the most veteran staff members. Eagles Soar reflects two institutional priorities: the first being Catlin Gabel's responsible action endowment fund, and the second being a new, state-of-the-art community center for athletics and wellness.

Catlin Gabel's responsible action endowment fund will pave the way for the school to make further progress on its deep commitment to diversity, equity, inclusion and belonging. This endowment fund will ensure that every student, staff and faculty member, and community member can be their authentic self and feel well-supported from the moment they step onto the Catlin Gabel campus. This endowment is critical to the success of Catlin Gabel, as it emphasizes what the institution stands for: integrity, inclusion, and kindness. Catlin Gabel prioritizes inclusion, financial assistance, and teacher recruitment and retention each day to ensure the continued success of its students, faculty and staff, and community members.

Catlin Gabel's new community center for athletics and wellness will feature a gym, as well as a student center for young learners to socialize and gather while on campus. It has been 50 years since Catlin Gabel built an athletic gym, and since then enrollment has increased by 50%, along with a 200% increase in indoor sports team participation. While not every student is an athlete, physical activity and wellness are important to Catlin Gabel students. The new facility will be an inclusive home for a broader vision for student wellness. In addition to traditional athletics spaces, there will be a space for physical activities such as yoga and dance, as well as classroom space for learning about health, life skills, decision-making, and stress management. The student center will serve as a social space for students to gather, hang out, and study with their peers.

### OVERVIEW ABOUT THE CAMPAIGN

**Campaign Goal:** \$30M

**Public campaign** starts in 2023

#### Three Priorities:

- Athletics & Wellness
- Endowment
- Tuition Assistance



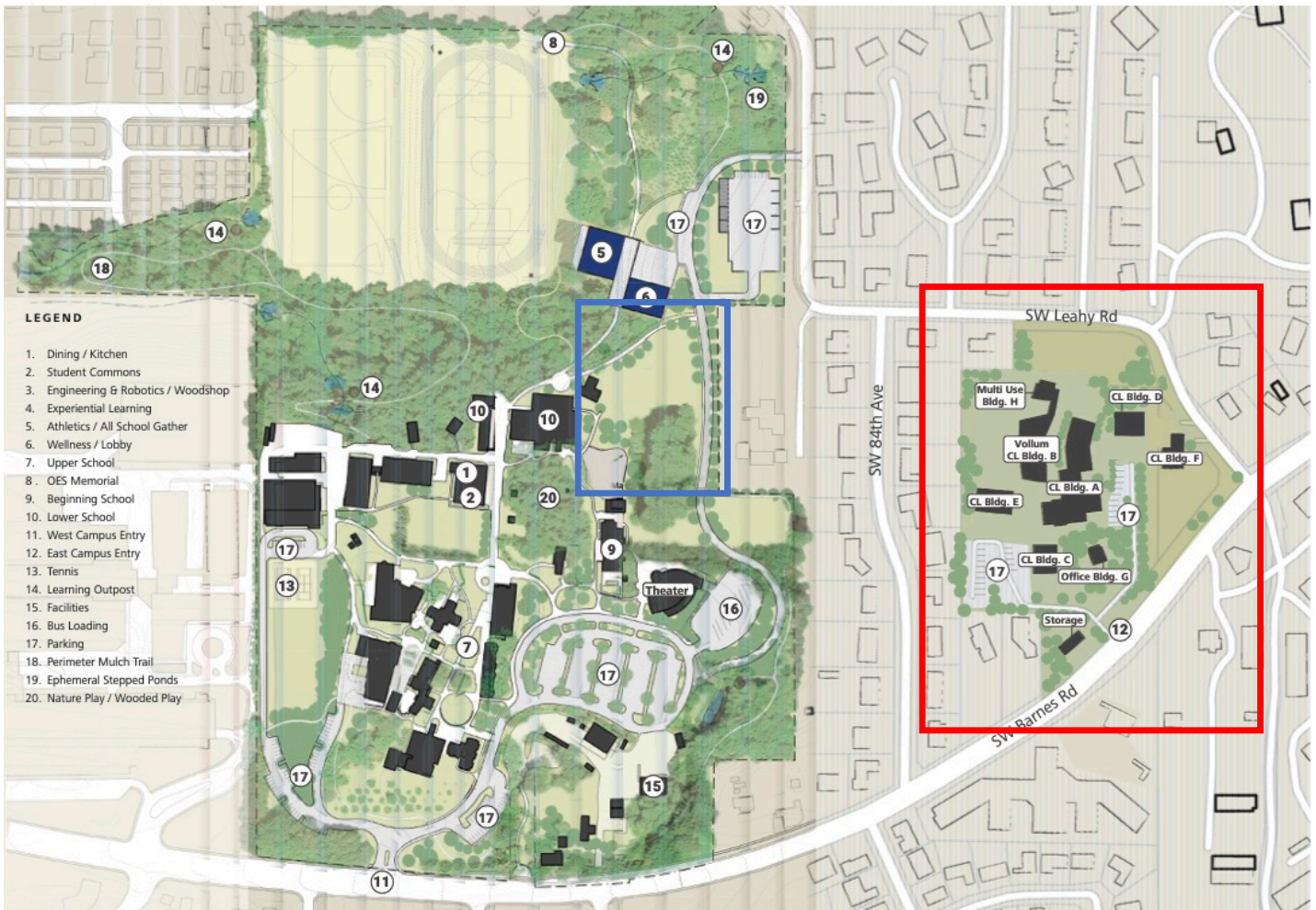


## Once-In-A-Generation Campus Expansion

As Catlin Gabel kicks off its \$30M Eagles Soar campaign, the school is also at the onset of a major campus expansion initiative. A few years ago, the school purchased a parcel of land adjacent to its main campus (see the blue box below). Called the Mordini property, this acquisition gave the school more fields and open space. As exciting as this purchase was, last year the school made a once-in-a-lifetime decision to acquire eight acres of land a few blocks to the east (see the red box below). Known as the East Campus, this property was the former home of the Oregon College of Art and Craft, which closed due to declining enrollment.

About a dozen buildings are spread out on a sloped parcel with various levels and many trees. A few buildings are relatively new, but most are older and will require significant retrofitting or more likely complete demolition and rebuilding. Nevertheless, an eventual major expansion, which most schools could only dream of, will be an integral part of allowing Catlin Gabel to develop a bigger, bolder, and more transformative future plan.

In the short-term, operating expenses have increased slightly to cover maintenance and insurance costs for the site, while revenue increases have been minimal given that only adult education classes can occur until the buildings are retrofitted. In the long-term, the campus will undeniably be an asset by allowing the school to do any number of bold initiatives, such as: moving an entire division there, permanently relocating administrative offices, using it as an overflow space while the main campus is redeveloped, or creating brand new learning spaces to be shared by all divisions. Thus, the immediate challenge for the school, a challenge that will require the next CFOO's input, is figuring out how to turn the East Campus from a slight fiscal liability into a usable asset that helps both the program and the balance sheet.





## KEY PARTNERS TO THE CFOO

Catlin Gabel's next CFOO will work closely and frequently with four major partners on numerous strategic initiatives involving finance and operations: the head of school, two assistant heads of school, and the board of trustees.

The CFOO reports directly to the **HEAD OF SCHOOL**, who serves as Catlin Gabel's chief executive officer. At a large and complex school like Catlin Gabel, the CFOO and head of school are in regular contact on all matters big and small.

Meanwhile, the head's cabinet comprises approximately ten senior administrators, each of whom is responsible for major areas of school life—both academic and non-academic. Although all of those cabinet members are peers to the CFOO and will be seeking a partner on matters of finance and operations, two roles, by virtue of their seniority and scope, work even more closely with the CFOO. An **ASSISTANT HEAD OF SCHOOL** oversees academic operations, including K-12 academic affairs and student life. An **ASSISTANT HEAD OF SCHOOL FOR ENROLLMENT AND EXTERNAL RELATIONS** oversees admission, marketing, communications, financial assistance, institutional research, and various auxiliary programs.

Finally, the CFOO serves on various committees of the **BOARD OF TRUSTEES** and has regular interaction with the chairs of the Finance and Endowment Committees. Even though the head of school is the board's sole direct report, the CFOO is a trusted advisor to the board as trustees consider implementing new strategies or evolving existing ones. On the following pages are short profiles of the board chair, the two assistant heads of school, and the head of school.

### MEMBERS OF THE ADMIN TEAM

Assistant Head of School

Head of Middle School

Assistant Head of School for Enrollment and External Relations

Head of Beginning and Lower School

Chief Finance and Operations Officer

Director of Human Resources

Head of Upper School

Director of Advancement

Director of Equity and Inclusion



## Indira Nallakrishnan, Board Chair



Indira Nallakrishnan feels deeply connected to Catlin Gabel School. Now entering her 15th year as a Catlin parent and her third and final year as board chair, Indira has experienced firsthand just how significantly Catlin Gabel has evolved over time. As a parent, Indira was instantly attracted to Catlin Gabel's strong value system, and the school's intense devotion to diversity, equity, inclusion, and belonging principles. She feels that Catlin Gabel's values align with her own family values, and she sees her children becoming mature, socially conscious individuals each day because of that. As board chair, Indira contributes to a committed, trusting relationship between the leadership team and the members of the Catlin Gabel community. She envisions the CFOO as an engaged and collaborative individual who values the empathy and respect that is ever-present at Catlin Gabel School. Indira hopes for a CFOO who aims to celebrate each student's educational journey with Catlin Gabel's values in mind.

## Kama Bruce, Assistant Head of School



As a devoted and progressive educator, Kama felt drawn to Catlin Gabel School's attention to student joy and innovation through its creative modes of experiential learning. In his position as the assistant head of school, Kama manages various aspects of the student experience, including athletics, outdoor education and Catlin Gabel's core curriculum. As the school prepares to welcome its next CFOO, Kama is hoping this individual will create clear, systemic pathways for the Catlin Gabel leadership team to achieve unified goals. For Kama, an ideal CFOO would be a forward-thinking visionary who is ready to support the school's educational framework and values. The recent land acquisitions excite Kama, given that space at Catlin Gabel is a premium and the school has such an ambitious vision. Kama feels extremely proud to belong to the leadership team at one of the premiere independent schools in the nation, and hopes the incoming CFOO will feel equally as proud to be part of such a diverse, talented, and dedicated community.





## Sara Nordhoff, Assistant Head for Enrollment & External Relations



Sara Nordhoff is proud to serve as one of the administrative leaders of Catlin Gabel. In 2011, Sara joined Catlin Gabel's admissions department, and later grew into her current role as assistant head of enrollment and external relations. Over the years, Sara has found joy and a sense of true belonging at Catlin Gabel, particularly within her resilient, supportive team. Recent times have posed unique challenges for the institution, and she feels proud that her team faced each obstacle head on, and came out stronger on the other side. Sara is excited to welcome

Catlin Gabel's new CFOO to the community, and is looking forward to working with a leader who is going to put Catlin Gabel's students and their families at the forefront of each operational decision. In an institution with an abundance of academic dreamers, Sara finds it important for the CFOO to be an individual who is well-equipped to outline the possibilities for the institution. She hopes this person will bring a systems-focused approach to each task, while wholeheartedly becoming immersed into this diverse and dynamic community.

## Tim Bazemore, Head of School



Tim Bazemore is entering his ninth year as Catlin Gabel's head of school, having led a school on the East Coast for fourteen years prior. Tim felt drawn to Catlin Gabel's vision, courage, and desire to be a national leader in progressive education. Over the past nine years, Tim has taken immense joy in solidifying Catlin Gabel as a model institution through its commitment to experiential learning, as well as its equitable and inclusive values. Tim has been described as his colleagues as innovative, visionary, and forward-thinking. He loves to be outdoors,

and each year he goes on multiday wilderness adventures in the mountains or desert. Tim believes in exploring and pursuing big ideas and transformative initiatives, such as a \$30M campaign as the school comes out of the pandemic, or a bold land acquisition that will require short-term investment but ultimately pay long-term dividends. Tim seeks a CFOO partner to provide counsel and insight on how to best prioritize, plan, and execute on the school's strategic initiatives.

### QUOTE FROM THE HEAD OF SCHOOL



*Catlin Gabel is entering an exciting new chapter. With a new campus just purchased and plans for major campus renovations about to get underway, I am seeking a CFOO partner who can help make these bold innovations a reality, while at the same time oversee the day-to-day operations of a high-functioning, progressive, enterprise-minded school.*



Tim Bazemore, Head of School

We invite you to watch 12M's interview with Tim (<https://bit.ly/3ExTtrh>), who shares why this new role is so important to the student experience at Catlin Gabel.



## THREE DEPARTMENTS UNDER THE CFOO

The CFOO oversees three mission-critical departments, all of which are led by professionals with not only a great deal of experience in their respective domains, but also years of service to Catlin Gabel. In addition, a third-party dining services manager reports to the CFOO.

### Finance

The finance department is led by a controller who has worked at Catlin Gabel for over twenty years. The controller oversees two other professionals: one person who focuses on accounts receivable, and another person who focuses on accounts payable and reconciliation. A finance and operations assistant also works in the department under the direction of the CFOO. The controller drives the school's daily financial operations in ways that will allow the CFOO to focus more on both operational matters and complex strategic priorities. The controller is deeply involved in budgeting and reconciliation, annual audit work, and representing the department when other directors have finance needs. The controller has great relationships throughout the school and in many ways serves as a de facto deputy director of finance. At a time when many strategic initiatives are on the front burner, Catlin Gabel seeks a CFOO who is willing to lean into tough challenges and important conversations involving setting and balancing financial priorities.

### Technology

Catlin Gabel's IT department is responsible for maintaining the technological health of the institution—both IT and instructional technology. At the helm is a director, who has been at the school for 20 years. The department comprises eight other dedicated professionals who are based in the heart of campus and eager to serve students, faculty, and staff. Under the director's oversight are all areas of school technology operations: help desk services, data / systems, audio / visual, network and infrastructure, and educational technology. At Catlin Gabel, lower- and middle-school students leverage school-owned iPads, while high-school students bring their own devices to school. Delivering high-quality, highly reliable technology services on this large, aging campus has required a great deal of time, money, and expertise, and both the East Campus expansion and new building campaign will require a continued investment in technology infrastructure.

### Facilities

Facilities is a large and mission-critical department at this 70-acre school. Overseeing the department is a director of facilities, who has been at the school for 16 years and in her current role for the last three years. Facilities at Catlin Gabel includes buildings and grounds, transportation, security, custodial, and event support. Some of those services are contracted out, and some are run in-house. Catlin Gabel is at a size where it often is desirable to run services in-house, but economies of scale can make that approach challenging. Transportation is a good example of such a service: it is vital to bringing a diverse array of students from across Greater Portland to campus, but it is expensive and difficult to keep fully staffed. Meanwhile, the school sets aside about \$1M for plant upgrades to repair and replace infrastructure on this former family farm, but even with that significant investment tough choices sometimes need to be made. The next CFOO should be ready and eager and able to support this area of operations, particularly as the school embarks on major changes to its physical plant.



## BACKGROUND & OPPORTUNITIES

The future is very bright for Catlin Gabel. For one, the school has excellent key performance indicators. In recent years, demand for enrollment has been solid and sustained, annual giving has always exceeded targets, and data analyzing academic outcomes and financial metrics are robust. Moreover, the school is successfully living out its mission. It has a clear sense of identity, its student population comprises 50% children of color, and it has consistently been ranked as the top school in Oregon.

A look into the future could reveal an even more impressive school. As described earlier in this document, two initiatives will undoubtedly transform both the physical plant and the program. The school has just embarked on an ambitious, \$30M campaign to support athletics, student life, and the endowment. Meanwhile, the school just bought an eight-acre campus a few blocks away. Although only minimal operations are occurring there now, Catlin achieved what few organizations these days can do: expanding its footprint via a very nearby plot of land that affords the school a host of options for substantial growth without having to relocate.

At the same time, like many schools Catlin Gabel is not without some short-term challenges and constraints that will require deft and determined leadership. The recent campus purchase has increased operating expenses. The upcoming campaign may require some short-term and long-term capital debt servicing, to allow for earlier groundbreaking. The good news is that Catlin Gabel has a history of operating without any long-term debt. The transportation program is getting costlier and harder to run, and it may be time to try a different approach than a fully in-house service. Although Portland remains a desirable destination for relocation, the economics of recruiting, relocating, and retaining faculty and staff gets harder each year. And finally, internal costs have gone up significantly recently, including increased insurance premiums.

Catlin has faced and is addressing a difficult chapter in school history, but one for which present leadership has worked hard to accept full responsibility and do the absolute right thing. The reader is invited to review Catlin Gabel's website, which provides full transparency around allegations, investigations, and ultimately confirmations of employee misconduct from the past.

Three guiding principles have informed present leadership on how to handle this difficult issue. First, the school wants to understand and acknowledge what happened. Part of that





commitment includes a candid, public acknowledgement, which is why the website is as transparent as it is. Second, the school wants to support alumni survivors, to help them heal. Third, the school wants to put in place policies and practices to ensure the highest level of student safety, both now and in the future. Ultimately, these principles and actions are about taking full responsibility and doing the right thing, and the next CFOO must be someone who is committed to those values as well.

Although the aforementioned short-term challenges will likely require some reprioritizations, Catlin Gabel is not facing any kind of existential threat or fundamental financial challenges. In fact, because the overall health of the school is so positive, the next CFOO should be spending an equal amount of time supporting and thinking about operations and finances. This is one reason that the job title has been tweaked from CFO to CFOO, to signal the interconnectedness of finance and operations oversight at a two-campus school on 70+ acres with dozens of buildings, many of which are original structures from when the property served as a family farm.

The outgoing CFO has been a dedicated and passionate supporter of Catlin Gabel. He has been a trustee, treasurer, parent, benefactor, and for over the last decade the school's finance officer. He will be departing from his post full-time at the end of January, and then will be serving in a consulting role for a couple months after that. Thus, the school would ideally onboard its next CFOO by January 30, to allow for a smooth handoff and overlap with the outgoing CFO. If the next CFOO is not able to start until later in 2023, the school might consider an interim plan to bridge a leadership gap. However, that would depend on finding the absolute right candidate, and it would require an early commitment by the next CFOO to engage remotely in a full hand-off with the outgoing CFO via a mutually agreeable supplemental contract.



Catlin Gabel is undeniably at an important moment in its history. With so many strategic initiatives either coming to a close, having just started, getting ready to launch, or sitting on the drawing board, there will be no shortage of exciting work for the CFOO. Because the school enjoys so much support from its extended community and has been blessed by stable leadership, the next CFOO can rest assured that plenty of outstanding partners will be engaged in all that important work. Between all the strategic priorities, day-to-day operations of this large school will also require plenty of time and attention. Once again, the next CFOO will find directors and department heads ready to lean into conversations and decisions involving mission-critical systems and services. In the end, the school is excited to welcome its next CFOO in early 2023 and looks forward to another long-term relationship with this mission-critical finance and operations leadership role.



## KEY STATISTICS

### FOUNDED

1957

### LOCATION

67-acre and 8-acre campuses located 5 miles west of downtown Portland

### STUDENTS

780 students in preschool through twelfth grade; 50% students of color

- Preschool & Kindergarten Students: 57
- Lower School Students (Grades 1-5): 215
- Middle School Students: 192
- Upper School Students: 316

### FACULTY AND STAFF

Approximately 220 full- and part-time employees--roughly 100 teachers and 120 admin and staff; 46% of faculty and staff identify as people of color

### ACCREDITATION

Northwest Association of Independent Schools (NWAIS)

### RELEVANT ASSOCIATIONS AND MEMBERSHIPS

National Association of Independent Schools (NAIS), National Business Officers Association (NBOA), Independent School Data Exchange (INDEX), Northwest Association of Independent Schools (NWAIS), Mastery Transcript Consortium, COGNIA

### TUITION

Beginning school (PS & K): \$31,000; Lower School (Grades 1-5): \$34,200; Middle School (Grades 6-8): \$37,400; Upper School (Grades 9-12): \$38,800

### FINANCIALS

- Endowment: \$37.6M (as of 6/30/22)
- 22-23 Operating Budget: \$27.1M
- Finance Assistance: \$5.4 million - 26% of Catlin Gabel families receive financial assistance

### WEBSITE

[www.catlin.edu](http://www.catlin.edu)





## DUTIES OF THE CFOO

### Cabinet Leadership

- Provide counsel to the head of school, to whom this role reports, and to the board of trustees, and forge collaborative relationships with the Treasurer and the heads of the Audit and Endowment Committees.
- Serve as a key executive team member for board committees and task forces including finance, technology, real estate, and compliance and risk management. Engage and support all members of the Admin Team on financial and/or operational initiatives and decisions that impact or originate within their respective departments.
- Work closely with the assistant head for enrollment and external relations and the assistant head of school, both of whom have broad areas of responsibility at the school.

### Finance

- Coordinate and oversee the annual budgeting process, both operating and capital, develop financial models for planning and budgeting, and lead the tuition setting process.
- Manage the organization's relationship with its bankers, and negotiate lines of credit and other credit and debt facilities as appropriate.
- Oversee all financial and investment processes, systems, and services — including the audit, tax filings, grant applications, accounting, investments, and cash management — many of which are managed on a daily basis by the controller, who supervises the finance team.

### Operations

- Oversee multiple operational units, including facilities, food service, and technology, each of which is led by a director or a third-party manager that works on-site.
- Advise and support the director of human resources, who reports to the head of school, on all matters involving people operations.
- Oversee risk management, insurance, vendor contracts and agreements, and leases, and seek to support equitable and inclusive business practices and relationships.

### Capital projects and change management

- Serve as project manager and/or advisor for capital building projects.
- Coordinate planning and design functions among the school, architects, building contractors, and owner's representatives.
- Develop project budgets and monitor spending throughout the design and building phases.
- Provide guidance on major change initiatives involving facilities, grounds, transportation, technology, dining services, and other operational aspects of the school.
- Incorporate the school's commitment to environmental sustainability when working with the facilities director on matters related to buildings, grounds, and transportation.

### General leadership

- Provide training and mentorship to direct reports and their respective teams.
- Develop and sustain a positive, productive, and supportive team culture.
- Perform other duties as assigned.



Catlin Gabel is looking for candidates who can demonstrate...

**Education and Experience:**

- Bachelor's degree required; Master's degree preferred
- CPA, or five years of fund accounting experience
- MBA, or five years of strategic planning experience
- Five years of team leadership experience, including supervising managers or directors
- High proficiency using technology for financial analysis, operations management, modeling, and reporting; experience with Blackbaud's Financial Edge desired but not required

**Competencies and Qualities:**

- Exceptional communication, collaboration, and relationship-building skills, including the ability to work with board members and school leaders, to contribute positively to organizational morale, and to coach others through change and complexity
- Excellent operational management skills, including experience with contracting, purchasing, and project management
- Broad-based analytical, problem-solving and leadership capabilities, and an ability to contribute strategically in areas beyond finance and operations
- A demonstrated commitment to diversity, equity, and inclusion, and an understanding of diverse cultures and experiences and an awareness of implicit bias
- An ability to create and maintain positive, supportive, and trusting relationships with individuals from diverse backgrounds and positions
- An ability to work as a team member to problem solve, compromise, and collaborate, bringing flexibility and the willingness to give and take direction when necessary
- Effective meeting facilitation skills, with an ability to monitor interpersonal interactions, foster collaboration, inspire productivity, and design clear decision-making processes
- Drive and self-motivation, an ability to multitask, and exceptional business judgment
- A desire to work at a progressive, mission-aligned K-12 school in service of a diverse and innovative faculty, staff, and student body.
- Good understanding of how to implement, leverage, and/or manage: internal controls, accounting and risk management policies, risk mitigation, and the audit process, including audited financial statements for nonprofits.
- Experience developing, implementing, and assessing asset allocation strategies for managing investments and endowments

**Working environment, physical requirements, and schedule:**

- Work is primarily performed in an office setting with moderate heat, sound and light.
- Work occurs during prolonged periods in stationary position at a desk or on a computer.
- This job requires mobility to traverse the campus to attend meetings and events.
- This job requires attending off-campus events, as well as occasional out-of-town travel.
- This is a full-time, 12-month senior leadership position. The CFOO must be available to represent the School at community-wide events and board-related meetings, which may take place on evenings and weekends. This position includes four weeks of accrued vacation and gets 10 extra holidays to use over school year



## HOW TO APPLY

12M Recruiting is acting on behalf of Catlin Gabel School to identify exceptional finance and operations leaders to fill this extraordinary opportunity. Please direct any inquiries to:

### GABRIEL LUCAS

Principal, 12M Recruiting  
[jobs@12MRecruiting.com](mailto:jobs@12MRecruiting.com)



## Applications will be considered through December 4, 2022.

All applications must be submitted online, via:

[www.12MRecruiting.com/jobs/catlingabel](http://www.12MRecruiting.com/jobs/catlingabel)

An application requires submitting four PDFs:

- Cover letter introducing yourself to the Catlin Gabel 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:

*As you read in this document, Catlin Gabel just made a major land acquisition of a small college campus. In a few years, the school hopes to be leveraging this asset to catalyze various expansion and/or redevelopment initiatives. What is an example of a project you supported or led that had a similar transformative impact on your organization?*

Catlin Gabel School seeks to employ the best qualified individuals from available applicants and to provide them with opportunity for advancement in a manner that does not discriminate because of race, color, religion, sex, national origin, citizenship, age, disability, sexual orientation, gender identity or expression, veteran status, genetic information, or any other status protected under local, state or federal equal employment opportunity laws or regulations.