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The  
Evergreen  
School

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# THE EVERGREEN SCHOOL

*Chief Financial Officer*

## SUMMARY

**Location** | Seattle, WA

**Post Date** | February 28, 2022

**Application Deadline** | March 28, 2022 at 5:00pm PDT

**Remote Semifinal Round** | Week of April 4

**On-site Final Round** | Week of April 18

**Decision Announced** | April 30, 2022

**Start Date** | July 1, 2022 (or earlier by mutual agreement)





## SUMMARY

Located just north of Seattle in Shoreline, Washington, The Evergreen School has been educating highly capable, creative learners for nearly 60 years. Our students love to ask questions, and our teachers use that natural curiosity to craft engaging lessons and spark thought-provoking conversations. Evergreen's program infuses challenging academics with foundational support for social skills, emotional well-being and empathy for others. Our students think deeply, take intellectual risks, and tackle complex problems. They learn how to self-advocate, collaborate with others and understand differences. Evergreen graduates move on to high school and beyond with confidence, ready to contribute to a diverse and dynamic world.

Evergreen currently enjoys an outstanding financial position due to prudent decision-making and thoughtful leadership. The incoming CFO will continue this legacy, working as a strategic partner with the head of school and board leadership, providing modeling, financial forecasting, and cost/benefit analyses for both operational and strategic initiatives. The role requires a forward-thinking, data-driven leader with excellent problem-solving skills and the ability to work collaboratively as part of a team. In addition, the successful candidate must have a commitment to our mission as an independent school for highly capable students as well as a commitment to diversity, equity, and inclusion.

Evergreen is seeking a highly-skilled, mission-driven, and experienced financial professional to become its new chief financial officer. The CFO reports directly to the head of school, serves as a member of the Senior Leadership Team, and supervises direct reports in five departments: Business Office, Facilities, Health/Safety, Auxiliary Programs, and IT. Primary responsibilities include development and management of the operating budget, oversight of all accounting and payroll functions, long-term financial planning, legal and risk management, human resources, financial aid, and operations involving facilities, IT, and Auxiliary Programs.





# MISSION AND CORE BELIEFS

## MISSION

We inspire highly capable, creative learners to lead with curiosity, compassion, and courage in a diverse and dynamic world.

## CORE BELIEFS

1. We believe in a learning environment that recognizes the journey from self to community. This ongoing focus on social and emotional growth develops a foundation in our students for understanding of and service to others locally and globally.
2. We believe in developing intrinsically motivated students who are energetic and passionate lovers of learning through emotional coaching, goal setting, self-reflection, and intellectual risk taking.
3. We believe our classrooms are not limited by physical boundaries and create environments that nurture curiosity, foster creativity and strengthen critical thinking.
4. We believe in modeling a willingness to accept mistakes, to have courageous conversations, and to commit to diversity in our community, our curriculum and our classrooms.
5. We believe that it is important for us to recognize the multiple perspectives and identities in our world so we build awareness and develop an understanding of what it means to be a global citizen.
6. We believe in helping our students learn to live with respect for each other, responsibility to the community and stewardship for our natural environment—both on our campus and beyond.





## LOOKING TO THE FUTURE

### NEW LEADERSHIP

In July 2020 Halsey Bell was hired as Evergreen's fifth head of school. Prior to that Halsey had served as Evergreen's upper division head for seven years. In that role, he worked closely with faculty to continually refine, innovate, and provide the best programming and curriculum to meet the needs of a highly capable population of students. In his first year and a half as head of school, Halsey has successfully guided Evergreen through the ever-changing challenges of operating a school in a pandemic, while also focusing on strategic



initiatives and improving Evergreen's cultural competence in hiring. In 2021, he hired two new members of the Senior Leadership Team, a director of enrollment management and a director of curriculum and instruction, rounding out Evergreen's 10-person Senior Leadership Team.

In June 2021, the Board of Trustees unanimously approved three strategic growth initiatives (SGIs) that will guide Evergreen's future. Developed with the support of Roam Consulting and a task force, made up of trustees and members of the

Senior Leadership Team, the SGIs represent transformative areas of growth for Evergreen in three key areas: Early Childhood Education, Access and Inclusion, and Creativity throughout the curriculum. At a retreat last spring, the board and the Senior Leadership Team drafted rationales and success statements for each initiative, and then invited feedback from the larger community in the form of focus groups led by our consultants. In total, nearly 100 members of the community (trustees, administrators, faculty, staff and parents) provided input that helped shape the initiatives. Work has continued this fall with a steering committee and three working groups made up of trustees, administrators and faculty. The SGIs will be formally launched for the broader community at a Town Hall meeting in March of 2022.





## PILLAR I – EARLY CHILDHOOD

The early learning grades of preschool, prekindergarten and kindergarten are truly the foundation of Evergreen. Over 85% of students at Evergreen today are beginning or began their Evergreen journey in one of these grades; investments here truly compound over a student’s lifetime at Evergreen and early childhood education done right represents the greatest period of social, emotional, physical and cognitive growth of the child’s lifetime.

Characteristics that we consider foundational to achieving our mission are the focus of these grades:

- Nurturing the curiosity and creativity of our youngest learners creates intrinsically motivated students with a true love of learning;
- Focusing on the unique social emotional needs of highly capable learners builds the interpersonal and communication skills to foster great discovery and collaboration with peers;
- Developing executive functioning skills at this young age establishes resilient students with the planning and problem solving skills to flourish in later grades;
- Reflection and awareness lead to agency and advocacy;
- And an early start on age-appropriate engagement with the topics of diversity, equity and inclusion place our learners firmly on the road to global citizenry.

**Strategic Growth Initiative:** Evaluate and elevate our successful Early Learning program to become a national leader in the early education of highly capable students.

## PILLAR II – CREATIVITY

As our mission states, we seek to attract and inspire creative learners. Why do we seek and inspire creativity? It is because:

- Creativity is the language of the curious: it is how we synthesize that which we have imagined or discovered and share it with others to enjoy and benefit from;
- Creativity is a catalyst: it allows students to convert tools and techniques and ideas into creations, inventions and transformations;
- Creativity is the difference between being stubborn versus being resilient: it’s the top tool of the problem solver, who can contribute and receive ideas from a diverse group of peers to craft a creative response and to discover novel solutions to vexing problems;
- And creativity gives us impactful new ways to express, communicate and then connect beyond just simply words being spoken or written.

**Strategic Growth Initiative:** Further enrich our culture of creativity by elevating creative growth and expression at all levels of our curriculum and programs.



### PILLAR III – ACCESS / INCLUSION

A school can have a powerful mission statement; a clear and consistent pedagogy; an integrated and aligned curriculum; and a great program delivered by outstanding faculty. Taken together, these form an outstanding designed experience available for learners. But a school can only consider itself a successful institution if it is filled with mission-aligned students who can fully access this experience. This is at the heart of equity and inclusion at a school — that all students have equitable access to the full designed experience and feel a true sense of belonging while engaged with their school.

We recognize that barriers to the full Evergreen experience exist for our students and must be removed so that we can fully deliver on our mission for 100% of our learners.

We also recognize that barriers exist for our teachers and staff, our greatest asset, and these barriers to a rewarding Evergreen employment experience must be addressed.

We realize that there are barriers for potential students to discover, apply and enroll in our school. These barriers must be removed to ensure our school is filled with a diverse student body of mission-aligned learners.

And Evergreen is more than just a school for its learners, it is a community that requires and delights in a collaboration with our parents and guardians. They too must have full access to the designed parent/guardian experience in order to partner fully in their children’s Evergreen experience.

**Strategic Growth Initiative:** Ensure full access to the full Evergreen experience for prospective families, current students, parents and guardians, and faculty and staff.





## EDUCATIONAL PHILOSOPHY

### AT EVERGREEN, WE BELIEVE LEARNING ISN'T A ONE-WAY PATH

Our highly capable students delight in exploring ramifications and digressions, gaining strength from setbacks and successes alike. At the same time, Evergreen's insightful teachers help students uncover and develop their own unique perspectives on every subject. Through "planned exploration," teachers carefully design the curriculum and lessons, while building in time and resources for students to pursue unexpected discoveries and long standing interests.

From preschool through 8th grade, Evergreen's hands-on curriculum encourages experimentation. In our extensively equipped BIG Lab (Build Imagine Grow), on overnight trips, during Adventure Days, and on the month-long 8th grade Global Studies trip, students expand their curiosity and put their classroom discoveries into practice. Equally important, we intentionally interweave academic subjects with social and emotional learning and an active commitment to inclusion and diversity—so that as students grow intellectually, they also become increasingly self-aware, build ethical relationships with others, and continually strive to improve the wider world.



Profound learning for the continuously curious means that we value depth over acceleration and sustained investigations over final conclusions. As students delve into our challenging, engaging curriculum, we welcome sudden brainstorms and tangential observations, knowing they lead to richer and more exciting understanding. Children discover that learning is iterative, non-linear, and ongoing. And that's why they love it.

### A COMMUNITY OF LEARNERS

Evergreen is an extended community of deeply engaged and proactive learners and citizens. The life-changing, ongoing Evergreen experience includes every one of us—students, teachers, administrators, parents, alumni, and friends.

We intentionally create an educational culture that supports judicious risk-taking and authentic self-reflection. We believe in working alongside the communities within and beyond our school walls, working as partners to determine needs and create solutions together. From helping our first graders organize their classroom to building a preschool in Peru, we cooperate with local and global organizations to address challenges and develop new perspectives.



## DIVERSITY, EQUITY, AND INCLUSION

Our vision for The Evergreen School is for its members to value and embrace the dignity and diversity of all people. We actively seek and support students, families, faculty, staff and trustees who bring a diversity of identity into our community.

Our mission makes it essential that we skillfully deliver an inclusive educational program that teaches respect for others, empowers students of all backgrounds equitably, encourages social responsibility, and prepares students to be leaders in an interdependent global community.

We recognize there is a critical difference between merely opening doors of opportunity and creating a sustained pathway toward success. At Evergreen, our goal is to curate a culture where every family feels fully welcomed and encouraged to participate in every aspect of the community.



In preparing our students for a diverse and complex world, we strive to intentionally incorporate issues of equity and social justice throughout our curriculum and across all grade levels. We encourage and support courageous conversations among the members of our community to promote greater cross-cultural understanding.

Our commitment to diversity is both a vital opportunity for our highly capable students and a fundamental responsibility for our entire community.





# BACKGROUND AND OPPORTUNITIES

## INTRODUCTION

As Evergreen approaches its 60th anniversary next year, the school is operating on an excellent foundation with an exciting future ahead. Debt is low, the endowment has grown tenfold over the last decade, enrollment is high, and several adjacent properties have recently been purchased. The current CFO, who has been with the school since 2013 and is retiring in June, is ready to handoff the financial and operational reins to the next CFO.

At the helm of Evergreen is Halsey Bell, a first-time head in his second year who rose up the ranks at Evergreen on the academic side. Peers describe him as strategic, kind, good-hearted, generous, positive, and comfortable with ambiguity. His tenure as head follows an important and successful era that brought Evergreen from a mostly grassroots environment to one with more robust systems and procedures. Halsey's charge is to leverage this solid foundation as he works to catalyze innovative ideas, both big and small.

Much of the leadership team at Evergreen is also new — in some cases to the school, and in some cases to senior leadership. The next CFO should see these factors as an unequivocally net positive, in terms of joining a leadership team that is energized, motivated, and ambitious — even as members are establishing norms, developing shared goals, and assessing the nuanced needs of their respective departments. For this school year, Evergreen does not have an assistant head of school, a role that Halsey held previously — though the role may someday return. Under the existing structure the current CFO has taken on additional managerial oversight for programs and departments that did not fit under other leadership domains. This willingness to support any and all aspects of the school would be an important characteristic for the next CFO.



## EXCITING TIMES AHEAD

The school as a whole is poised for potentially big plans and initiatives. With the new properties recently acquired, the school has many options for potential plant and/or programmatic redevelopment. Once the school coalesces around a vision, resulting initiatives might require a capital campaign, construction, or both. The school has retained the services of an owner's representative to help with the day-to-day aspects of potential construction projects, but it would be helpful — though not required — if the next CFO had been through a capital campaign, a plant redevelopment project, or both.



Another potential focal point is access. The school wants to make sure everyone has an equal opportunity to experience all the great aspects of an Evergreen education. This conversation runs through the financial aid program, which currently is overseen by the CFO and involves a committee of faculty and staff who assess and balance family needs. In the near future, it's possible that the responsibility for managing financial aid will move out of the Business Office, but no changes are planned for the 22-23 year. Thus, Evergreen needs a CFO who is empathetic and attuned to affordability challenges and unique family circumstances, as well as outstanding as a communicator around difficult conversations.

A third potential focal point involves creativity. At a school like Evergreen, academics are only the beginning. Co-curricular programs are essential to complement the school's robust teaching and learning program for its highly capable students. In its own way the Board of Trustees is thinking creatively about big items the school will need to fulfill these major plans, from increasing staffing to continuing to grow the endowment — all while keeping the school affordable for families and competitive in its quest for talent. On that last note, next year Evergreen will be in its final year of a compensation readjustment phase, to bring salaries to the 50-75% quartile in comparison to peer schools.

In between all these major plans, the CFO will continue to manage many aspects of core operations. The business office comprises three individuals: a controller, an HR manager, and an accounts payable and payroll coordinator. Four external departments roll up to the CFO: auxiliary programs, facilities, health/safety, and IT, in addition to financial aid, which is viewed more as a collaboratively administered program. Each of those four departments has a director or manager with varying degrees of experience at Evergreen and in their field. The right CFO will be able to support each one differently and recognize that some heads need more operational assistance as they set their department's vision, while others would be better served with leadership guidance as they manage day-to-day operations.





## ABOUT THE NEXT CFO

When asked to describe the next CFO, both in terms of qualities and experiences, Evergreen constituents described a multidimensional profile of a skilled and thoughtful colleague:

- Someone who is able to operate in the complexity and ambiguity of strategic thinking and planning
- Someone who will bring cultural competency to the domain of finance and operations, and is excited to grow in this area with help from others at Evergreen
- Someone with a flexible mindset that is open to the big ideas of others
- Someone who is willing to grapple with tough tradeoffs when it comes to financial aid and family need, who takes comfort in engaging with a diverse family population, who is abreast of financial aid trends, and who is in the business first and foremost to support families
- Someone who is not afraid to have courageous conversation and at times will gracefully push back, but not operate with a dogmatic or rigid approach to financial and operational matters
- Someone who is plugged into data, but at the same time is compassionate and collaborative with decision-making and school leadership



Evergreen is an authentic school where everyone is truly behind the mission. The school does an outstanding job educating its students academically and preparing them for high school, but at Evergreen the social and emotional learning priorities of developing the whole child truly shine through.

In that same way, Evergreen seeks a CFO who knows the domains of finance and operations exceptionally well, but ultimately will be a warm, gracious, and mission-aligned colleague ready to learn from others. Come this summer, Evergreen is ready to welcome that next CFO to this school under the trees just north of Seattle.

## QUOTE FROM THE HEAD OF SCHOOL

*"We are looking for a CFO who is collaborative in style and strategic in their thinking; someone who is excited to join a new leadership team with ambitious growth opportunities in front of us. The new CFO will be a culturally competent individual who is capable of balancing a commitment to Evergreen's mission while fulfilling the fiduciary responsibilities of the role."*

Halsey Bell, Head of School



## KEY STATISTICS

**Founded:** 1963

**Location:** Evergreen occupies four and a half acres that include forested area typical of the Pacific Northwest, as well as distinct wetlands and native vegetation. A recent renovation and addition added significant new classroom and administration buildings, including the BIG Lab (Build Imagine Grow), a state-of-the-art makerspace, as well as beautiful outdoor gathering areas and courtyards.

**Students:** 491 students in grades PS through 8; students come to Evergreen from 38 ZIP codes and a wide variety of schools and daycare programs; 52% of Evergreen students identify as students of color, including African American, Asian American, Latino American, Middle Eastern American, multiracial American, and Native American

**Admission:** 79% yield; 5.56% annual attrition

**Athletics:** Over 70% of students play on at least one team, all of which have a no-cut policy.

**Summer Program:** Pre-Covid over 800 children from across the Seattle metropolitan area enrolled during the summer, choosing from 200 enrichment classes and camps.

**Faculty and Staff:** 132 faculty and staff, including 55 full-time faculty and 5 part-time faculty; 71% of teaching faculty hold an advanced degree; student-to-faculty ratio of 7:1

**Accreditation:** Northwest Association of Independent Schools (NWAIS)

**Association Memberships:** National Association of Independent Schools (NAIS), National Business Officers Association (NBOA), Council for Advancement and Support of Education (CASE), Puget Sound Independent Schools (PSIS), National Association for Gifted Children (NAGC), Washington Federation of Independent Schools (WFIS)

**Tuition:** \$16,430 (Preschool), \$33,200 (PK-5th grades), \$35,145 (6th-7th grades), \$37,220 (8th grade)

**Environmental Certifications:** The Evergreen School is proud to be a Platinum-Certified Washington Green School and a Sustaining Green School in the King County Green Schools Program.

**Financial Aid:** 14.4% of families receive need-based aid, totaling approximately \$1.5M

**Financials:** Operating budget \$17.1M; endowment over \$25M as of June 30, 2021

**Website:** [www.evergreenschool.org](http://www.evergreenschool.org)



# CHIEF FINANCIAL OFFICER

## SPECIFIC DUTIES

### *General leadership, strategic direction and financial management*

- Report to the head of school, participate as a collaborative member of the leadership team, and serve as a trusted advisor to the head, leadership team, and Board of Trustees.
- Oversee multi-year initiatives and areas of critical importance to Evergreen, including: large-scale borrowing, plant redesign and construction, endowment, and investment.
- Provide strategic direction for appropriate and maximum use of financial resources, build multi-year budget models and forecasts, and develop key performance indicators—all to achieve the school's strategic priorities and maintain long-term health of the institution.
- Oversee several important operational units and major programs, most of which are led by directors or managers: auxiliary programs, facilities, financial aid, health/safety, human resources, and information technology.
- Serve as lead liaison for the Finance, Investment, and Facility Committees and provide effective communication, presentations, and updates to the full Board of Trustees.
- Publicly represent the school in a positive and proactive way, collaborating with other school administrators, neighbors, and public officials.

### *Compliance, risk management and reporting*

- Oversee internal controls, cash management, banking relationships, and asset management, and maintain accurate and timely continuous records on the financial position of the school.
- 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 with a comprehensive risk management and insurance program.
- Provide transparent financial reporting and planning that build trust among administrators, faculty, staff, students, alumni, parents, and trustees.

### *Operational management and oversight*

- Collaborate with the head of school and other senior administrators to provide leadership regarding employee compensation and benefits.
- Oversee the business office and its core operations, including: AP, billing and collections, credit card management, cash receipts, payroll, and GL accounting.
- Develop processes and systems that provide clarity—and flexibility when necessary.
- Perform other duties as assigned.



## EVERGREEN IS LOOKING FOR CANDIDATES WHO CAN DEMONSTRATE...

### ***Professional Qualifications:***

- Possession of a bachelor's degree from an accredited college or university in business administration, finance, accounting, or a related field, which is a minimum requirement; an MBA or graduate degree highly preferred
- 5+ years of management-level experience in areas of finance and operations, preferably in an educational, not-for-profit, or mission-aligned organization
- Previous supervisory and governance experience, preferably in an educational, not-for-profit, or mission-aligned organization
- A comprehensive skill set for oversight of financial reporting, budgets, investment and endowment strategy, accounting, facilities, construction and project management, HR, technology, and risk management

### ***Desired Experience, Skills and Mindsets***

- Cabinet-level leadership
  - A strategic decision maker able to analyze complex situations, work under pressure, and effectively plan and delegate
  - A systems mindset committed to delivering outstanding project management
  - An excitement about working with a new head of school and highly talented leadership team, many of whom are relatively new to their respective roles
  - Excellent communication and presentation skills
- Cultural competency
  - Demonstrated cultural competence skills that allows for successful collaboration across diverse cultures and backgrounds
  - An open-mind that asks questions, learns from others, and brings a collaborative and respectful approach to problem solving
  - An ability to build relationships and trust with constituents from diverse cultures and backgrounds
  - Experience looking at decisions or problems with a diversity, equity, and inclusion perspective that leads to increased access and inclusion
- Community partner
  - Alignment to the mission and values of Evergreen
  - A love of education, and a willingness to support innovative teaching and learning at an early childhood to grade eight independent school
  - Authentic empathy, warmth, and collegiality
  - A cooperative and growth-oriented mindset ready to build consensus



## HOW TO APPLY

12M Recruiting is acting on behalf of The Evergreen School to identify exceptional finance and operational 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 MARCH 28, 2022.

All applications must be submitted online, via:

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

An application requires submitting four PDFs:

- Cover letter introducing yourself to the Evergreen 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:

*(One page maximum) How would you as the Evergreen CFO align efforts to improve organizational policies and procedures with overarching goals to advance equity and inclusion? Share any insights you have learned from past experiences.*

*The Evergreen School strives to provide equal opportunity to all employees. The school's policy is not to discriminate in employment based on race, color, sex (including pregnancy), religion, creed, age, national origin, citizenship status, physical or mental disability, sexual orientation, gender identity, veteran or military status or any other status protected under applicable local, state or federal law. The School is committed to administering employment decisions, including hiring, promotions, compensation benefits, transfers, layoffs, return from layoffs, terminations, training, sabbaticals, tuition assistance and other programs, without regard to an employee's protected status.*

