

The Agnes Irwin School

Chief Financial Officer

Since the School's founding in 1869, The Agnes Irwin School (AIS) has dedicated itself to providing an exceptional and empowering education for girls. Rooted in academic excellence, scholarship, community, and collaboration, AIS consistently tailors its programs to the distinctive and individual needs of girls, holding fast to the principle that a girl's educational journey from childhood through graduation should be joyful, challenging, creative, and inspirational. Mindful of this history, and with dynamic new leadership, The Agnes Irwin School invites applications and nominations for its next Chief Financial Officer.

MISSION

The Agnes Irwin School empowers girls to learn, to lead, and to live a legacy.

TO LEARN

Agnes Irwin provides girls with a deep foundation in the humanities, mathematics, science, wellness, and athletics. In an inclusive setting that values diversity, students develop skills in critical and analytical thinking, self-expression, effective communication, and collaboration. A rich and varied approach to instruction, team and individual endeavors, inquiry, and assessment enables girls to solve problems, design solutions, create meaning, and prepare for a complex and challenging world.

TO LEAD

We believe that all girls and young women have the capacity to lead, and that leadership can take many forms. Therefore, through our instruction, our community interactions, and our daily choices, we affirm this belief and provide an environment that challenges girls to develop the core values of leadership: empathy, integrity, resilience, independent thinking, and commitment to action.

TO LIVE A LEGACY

Agnes Irwin students are a part of the global community of girls and women. They are also the trustees of our School's heritage and traditions. By adopting values that foster equity, justice, social responsibility, civic-mindedness, and integrity, and by nurturing positive relationships and intentional decision making, our students and alumnae engage in bold and meaningful ways to impact our interconnected world.

ABOUT THE AGNES IRWIN SCHOOL

The Agnes Irwin School (AIS) is an independent, college preparatory day school with more than 570 girls in Pre-Kindergarten through 12th grade. AIS offers a unique opportunity for its students: nurturing leaders with a tenacious spirit and sense of integrity, while prioritizing civic engagement and independent thinking through a rigorous liberal arts curriculum within a collaborative environment. Young women gain maturity and self-confidence at AIS, as they are challenged to become the global leaders of the future.

Situated just 12 miles west of Philadelphia in Rosemont, PA, AIS sits on a beautiful 24-acre campus equipped with extensive classroom facilities as well as spaces dedicated to the arts, science, technology, engineering, and athletics. Along with three divisions—[Lower](#), [Middle](#), and [Upper](#)—AIS uniquely includes the [Center for the Advancement of Girls](#), which is devoted to creating research-based programming and partnerships to ensure the School continues to be at the forefront of what is best for girls.

Agnes Irwin's 178 faculty and staff personify the School's commitment to academic excellence and model a community with a breadth of experience and perspective. [The teachers](#) cherish and reward determination, creativity, and independent thinking in an academically rigorous and supportive environment. Small class sizes allow for an understanding of individual student interest, personal development, and skill enhancement. Outside of the classroom, AIS students have the opportunity to foster their leadership skills, curiosity, and sense of adventure through a [robust arts program](#), [competitive athletics](#), and [extracurricular programs](#).

The School's financial position is strong, with an endowment value of over \$26 million and an annual operating budget of approximately \$21 million.

Over one hundred and fifty years ago, The Agnes Irwin School was founded by Miss Agnes Irwin, the great-great-granddaughter of Benjamin Franklin. She was the first Dean of Radcliffe College and advocate for the education of girls and young women—a radical concept in her time. Today, Miss Irwin's legacy continues to serve as an inspiration. Everything AIS students experience is rooted in what is best for girls: how they learn, how their brains develop, and what their social and emotional needs are. AIS girls feel known, understood, supported, and challenged, empowering them to be their best selves.

DIVERSITY, EQUITY, AND INCLUSION

The Agnes Irwin School fosters an inclusive and equitable community by honoring the individuality of all students, families, teachers, and staff. Diversity of experience, thought, and ideas is not only a pillar of the School but an integral part of the learning process and the AIS experience. Aspects of individuality are explored through inspiring speakers, a rigorous curriculum, faculty development, and student organizations. Every day, AIS nurtures the necessary skills and provides experiences for students to thrive in a diverse and inclusive community.

[Equity and inclusion work](#) is a collaborative effort at AIS. Four coordinators—one for each academic division and one for staff—work together with division directors and the Assistant Head of School for

Academics and Inclusive Excellence to implement programming and resolve conflicts. All members of the senior administrative team are expected to model and support inclusive excellence.

LEADERSHIP

Sally Keidel, Head of School

[Sally Keidel](#) took office as Head of School on July 1, 2020. She returned to AIS after serving as Head of The Montgomery School, a PreK-8 school in Chester Springs, PA. Sally, who holds a master's in educational leadership from the University of Pennsylvania, has enjoyed success in a variety of roles throughout her nearly 30-year career in education—from teacher, to director of residential life, to admissions director. Prior to assuming headship of The Montgomery School, she served as Assistant Head of The Agnes Irwin School from 2012 to 2014, as well as Director of Admission and Financial Aid from 2007 to 2014.

Board Leadership

The Agnes Irwin School enjoys strong support from a [Board of Trustees](#) made up of parents, alumnae, and leaders of industry. The Finance, Audit, Investment, and Buildings, Facilities, and Grounds committee members will be important partners for the next Chief Financial Officer.

CAMPUS AND THE PHILADELPHIA AREA

The Agnes Irwin School is located on a 24-acre campus in Rosemont, Pennsylvania, a Main Line suburb west of Philadelphia. The self-contained Lower School includes a gymnasium, cafeteria, library, and the [iWonder lab](#) (a maker space dedicated to the youngest learners) in addition to classrooms and office space. The Middle and Upper Schools are located in a separate large building complex that was renovated in 2014 to include a student life center, the Arts and Science Center, Library, Athletic Center (featuring a basketball/volleyball court, a rowing center, and squash courts), and outdoor dining commons. The campus also features five tennis courts, three playing fields, and three playgrounds. The School owns outright multiple properties adjacent to campus, including the current Head of School residence, a second residence, and a large property that houses meeting and event space as well as the development, marketing and communications, and business staff.

Located in an area that is home to many excellent [colleges and universities](#) and only 12 miles from Philadelphia, The Agnes Irwin School takes advantage of all that the region has to offer. Philadelphia—the nation's sixth-largest city and hub of the northeast corridor—offers a diverse population, vibrant cultural life, top-notch entertainment, major league sports, rich history, and abundant opportunities for AIS students, faculty, and staff to explore.

THE ROLE OF THE CFO

Reporting to the Head of School and overseeing a team of seven direct reports, the next Chief Financial Officer at The Agnes Irwin School will serve as a key member of the senior leadership team. The CFO establishes and maintains the financial infrastructure and policies for the fiscal integrity of the institution and ensures the School's daily operations effectively meet the mission, while partnering with internal and external stakeholders. The CFO acts as a liaison to the Board, serving as the staff liaison for the finance, audit, and investments committees, as well as the committee for buildings, facilities, and grounds; provides strategic leadership and advice; and is responsible for financial strategy decisions as well as the School's daily operations. The CFO partners with the Head of School and the senior team in planning and development to ensure that approved strategic initiatives are appropriately funded. The CFO oversees the business office, human resources, facilities, IT, security, transportation, and auxiliary programming, as well as relationships with outside vendors including dining services (Culinart).

The Chief Financial Officer's direct reports include:

- Controller
- Director of Auxiliary Programming
- Director of IT
- Supervisor of Facilities
- Supervisor of Security
- Director of Human Resources

The next CFO will be expected to:

- Ensure all aspects of the School's financial management and accounting functions as a 501(c) (3) not-for-profit institution reflect sound and prudent stewardship and compliance with regulatory agencies.
- With the Head of School and Board of Trustees, plan the operating and capital budgets and develop a long-term sustainable economic model to maintain and advance the financial stability of the School.
- Establish and maintain a plan and calendar to prepare annual budgets, providing monthly reports, such as operating statements and reports of expenditures, for each budget center.
- Review monthly financial statements to include general ledger account balances and activity detail, endowment and cash summaries, and prepare and present the same to the Head of School, Treasurer, and Board of Trustees.
- Review annual financial statements to include end of year general ledger account balances and activity detail, student accounts receivables, bookstore and prepaid inventory/assets, and accounts payables.
- Secure independent financial auditor's engagement for School, Alumnae Association, and Parents Council, including scheduling review of audited financial statements and auditor's opinion with the School's Audit Committee.

- Propose and maintain investment vehicles for liquid, secure, and optimum short-term management of the School's cash balances; propose and maintain qualified, competitive banking relationships for purposes of corporate check writing, payroll deposit and transfer management, and line of credit features.
- Prepare local and national historic comparative revenue and expense data and trends as reported to NAIS for Finance Committee review and consideration.
- Minimize the School's exposure to liability, ensuring that the School's real and personal property, commercial general liability, automobile, workers compensation, umbrella, educators' legal liability, student accident and builders risk insurances provide adequate and appropriate coverage.
- Represent the School in its request for proposals and contractual arrangements for all aspects of its outsourced professional services to include: financial, governmental, health and human resources, legal, architectural, engineering, construction, furnishings, insurance, cafeteria, and custodial services; and review and approve or secure institutional/corporate approvals of contract documents and purchases as required by the School's Financial Management Authority.
- Serve in the capacity of owners' representative to local municipal and regulatory agencies for purposes of securing land development and building approvals and to township departments, neighborhood associations, and local businesses and educational institutions for purposes of establishing productive and mutually attractive facilities leasing or sharing relationships.
- Identify and initiate enhancements to the School's physical plant that will preserve, replace, or increase asset value and institutional flexibility and functionality; maintain annual levels of PPRSM (Provision for Plant Replacement and Special Maintenance) funding to accomplish this objective; secure proposals, review and approve renovation/construction plans and products to facilitate enhancements.
- Work with the Director of Admissions in projecting enrollment and financial aid information that will inform annual and long-range operating budget models.
- Support the Director of Development in the advancement of capital and annual fund planning and parent council and alumnae inquiries and events.
- Collaborate with the Director of Human Resources on development and implementation of strategies to improve the School's financial and operational performance.
- Support the Director of Auxiliary Programming in securing and approving physical and personnel resources required for successful implementation of auxiliary programs.

OPPORTUNITIES AND CHALLENGES

The next CFO will have the opportunity to lead in the following areas:

Enrollment and Costs: AIS operates from a sound position within the highly competitive Philadelphia-area independent school market. Working with the Head of School, senior leadership, and the Board, the CFO will help identify ways to further distinguish AIS and present options and implement strategies to identify

additional sources of revenue, manage and control costs, and manage tuition rates. In addition, the CFO will partner closely with the enrollment team with a particular focus on net tuition revenue as well as the review and allocation of the tuition discount.

Philanthropic partnerships: AIS is currently in a period of growth, including the execution of a fundraising campaign focused on endowment. The CFO will possess the ability to communicate effectively with donors and other external constituents, boosting confidence in the School's ability to appropriately serve as a good steward of philanthropic investment. The CFO will also partner with colleagues in the Advancement office to ensure smooth internal processes around philanthropic donations.

Leading teams: The CFO will lead in such a way that their team sees themselves as an essential part of the institution, creating a dynamic partnership between the business side and operational side of the School. The team needs to be highly customer-service-focused with campus colleagues as well as with parents and other external constituents, finding ways to provide the appropriate level of information for different stakeholder groups.

Ensuring efficient operations: The next CFO will lead the implementation of new technology, processes, and initiatives to improve the efficiency and impact of campus operations while ensuring that processes are well coordinated across the institution, aligned with priorities, minimize institutional risks and costs, and are communicated openly.

Risk Management: The CFO will ensure that processes are well coordinated across the institution, align with priorities, safeguard its assets, and minimize institutional risks and costs. Open, transparent communication and educating the campus community around risks are essential. The CFO will also serve as the chief liaison with AIS's outside investment and legal counsel.

Advancing diversity, equity, and inclusion within the AIS community: The next CFO will be joining the AIS community at a time of national reckoning around racial injustice. The Director will promote a culture and environment in which all members of the AIS community, diverse in myriad aspects of background and worldview, are not only welcomed but viewed as essential in the pursuit of academic excellence. These conversations are ongoing at AIS, and it is essential that the CFO possesses the skills and passion to articulate and galvanize these efforts as the School follows through on its commitment to become an anti-racist institution.

Navigating a time of creative change: Last year The Agnes Irwin School celebrated 150 years since its founding. The School's community is now focused on creating the next chapter in its history, and it is doing so at a time when schools are reimagining what education looks like during and after a pandemic. With a robust and illustrious history, along with a tremendously strong alumnae community and new leadership at the helm, AIS is poised to be a leader in these efforts. The next CFO will have the opportunity to engage in this momentum while leading the strategy to effectively and efficiently direct the school's resources to support these efforts.

DESIRED QUALIFICATIONS AND CHARACTERISTICS

In addition to demonstrated accomplishments in complex, strategic financial planning and execution, a proven ability to affect and influence change through a collaborative and inclusive style, and excellent communication and presentation skills, the next Director will be someone who possesses the ability to:

- Speak and communicate effectively with a wide range of constituencies (trustees, students, faculty, parents, alumnae, donors, community).
- Be willing and able to make difficult, timely, and financially responsible decisions with the ability to comprehend, articulate, and resolve risk, legal, and institutional considerations in all decision making.
- Possess a high degree of professional discretion, integrity, good judgment, and high standards of professional conduct.
- Be a strong, experienced, and sophisticated manager who can create and enforce clear administrative systems, policies, and guidelines.
- Possess strong project management skills, from planning to execution.
- Prefer working in an environment that encourages intellectual agility and creative problem solving.
- Personally value diversity and possess a commitment to inclusive excellence.
- Be an effective, fair, and open negotiator who is committed to a transparent and collaborative decision-making process with all parts of the AIS community.

A bachelor's degree is required; an MBA or other appropriate degree and CPA is preferred. Strong candidates will enthusiastically embrace the mission of The Agnes Irwin School. Experience within an independent school, higher education, or other values-driven environment is preferred. An ability to work collaboratively within a diverse community with multiple constituencies and to build cooperation and consensus is essential.

For best consideration, please send all nominations and applications to:



Shelly Weiss Storbeck, Managing Partner
Lisa Solinsky, Senior Associate
Storbeck Search
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The Agnes Irwin School respects and values diversity, including but not limited to differences in age, ability, ethnicity, family structure, gender identity, national origin, physical attributes, race, religion, sexual orientation, and socioeconomic level. We actively promote and develop a school community that is culturally competent, socially responsible, and globally engaged.

The Agnes Irwin School does not discriminate in any term or condition of employment on the basis of race, color, religion, sex, sexual orientation, ancestry, citizenship, national origin, age, disability, veteran status, genetic information or any other characteristic or status protected by federal, state or local law.