



## St. Michaels University School

**Position Title:** Chief Financial Officer

**Reporting to:** Head of School

**Classification:** Senior Leadership Team

### **Position Summary:**

Reporting to the Head of School, the Chief Financial Officer (CFO) provides strategic leadership and oversight for all financial and administrative operations to ensure the school's long-term fiscal health, sustainability, and responsible stewardship of resources. This role also provides executive oversight of Information Technology, Risk Management, Privacy Compliance, and External Programs.

The CFO is a key member of the Senior Leadership Team and collaborates across departments to align financial and operational strategies with SMUS's mission and Floreat 2030 priorities. The CFO champions equitable and inclusive financial practices, ensuring resource allocation, operational systems, and revenue-generating programs are managed in ways that support accessibility, belonging, and fairness across the school community.

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### **Key Responsibilities & Expectations**

#### **Budget and Finance**

- Provide strategic financial guidance to the Head of School and Board of Governors to support sustainability, accessibility, and long-term institutional strength.
- Lead development and oversight of the School's operating and capital budgets, ensuring transparent and equitable allocation of resources.
- Prepare financial statements and reports for the Head, Finance Committee and Board.

**Junior School** 820 Victoria Avenue, Victoria, BC, Canada V8S 4N3 **Phone:** 250-598-3922 **Fax:** 250-592-0783  
**Middle School** 3400 Richmond Road, Victoria, BC, Canada V8P 4P5 **Phone:** 250-592-3549 **Fax:** 250-592-3942  
**Senior School** 3400 Richmond Road, Victoria, BC, Canada V8P 4P5 **Phone:** 250-592-2411 **Fax:** 250-592-2812

- Approve agreements involving financial commitments and contractual obligations.
- Maintain accounting policies, internal controls, and sound financial governance practices.
- Ensure compliance with all applicable laws and maintain tax-exempt status.
- Fulfill CAIS benchmarking and statistical reporting requirements.
- Manage relationships with financial institutions.
- Collaborate with Admissions and Advancement to align enrolment, financial aid, and fundraising strategies with budget priorities, ensuring fairness and accessibility in financial planning.

## **Leadership & Oversight**

- Lead and mentor the Controller, Director of External Programs, and Chief Information Officer.
- Foster a collaborative, respectful, and inclusive leadership culture across all reporting departments.
- Support professional growth and leadership capacity within operational teams.

## **Risk Management & Privacy**

- Identify, assess, and mitigate financial and operational risks.
- Maintain insurance coverage and manage claims.
- Oversee policies and procedures for data protection, privacy, and confidentiality.
- Ensure compliance with privacy legislation and best practices.
- Train staff on privacy and responsible data use.

## **Information Technology**

- Provide strategic leadership for IT governance, cybersecurity, and systems sustainability.
- Ensure technology supports both academic and administrative operations equitably and accessibly.
- Oversee technology procurement and vendor management with attention to accessibility, usability, and inclusive design.

- Ensure compliance with data security standards and disaster recovery planning.

### **External Programs & Ancillary Revenue**

- Provide executive oversight of summer camps and external programs.
- Ensure revenue-generating activities align with financial sustainability, community reputation, and inclusive access.
- Oversee financial performance, contracts, and operational risk related to external programming.

### **Equity, Diversity & Inclusion**

- Apply an equity lens to budgeting, financial aid modelling, procurement, technology access, and operational decision-making.
- Ensure financial and operational policies do not create unintended barriers for employees, students, or families.
- Support inclusive vendor and partner practices where feasible.
- Model leadership that reflects SMUS's commitment to belonging, accessibility, and fairness.

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### **Qualifications, Experience and Skills**

- Minimum 10 years senior financial leadership experience, preferably in independent schools or the non-profit sector.
- Professional accounting designation (CPA or equivalent).
- Experience creating and managing multi-million dollar budgets, forecasting, and knowledge of generally accepted accounting principles and fund accounting.
- Experience managing various financing vehicles.
- Experience overseeing operational and administrative portfolios, including IT and external revenue programs.
- Knowledge of laws and financial reporting standards for independent schools.
- Familiarity with CAIS, NAIS and ISABC benchmarking and best practices.

- Demonstrated ability to incorporate equity and accessibility considerations into financial and operational leadership.
- An understanding of the financial and strategic decisions that are encountered in a not-for-profit, educational, mission-driven institution;
- The ability to envision, articulate, advance, and implement effective approaches to balancing competing financial needs within the institution.
- Excellent communication and interpersonal skills.
- Collaborative and solutions-focused leadership style.
- Strong organizational and conflict resolution skills.
- Ability to work independently while partnering effectively across departments.
- Excellent listening skills and sound judgment.
- High integrity, strong work ethic, and a positive, approachable leadership presence.