Lake Washington School District

CHIEF FINANCIAL OFFICER

Job Description

Position Title	Chief Financial Officer
Reports To	Superintendent
Leadership Role	Member of the Superintendent's Executive Cabinet
Division	Financial Services
Employment Status	Executive, exempt, year-round
Location	Lake Washington School District, Redmond, Washington

Exceptional experiences for each learner.

The Chief Financial Officer ensures that financial strategy, systems, decisions, and services advance the District's mission and support every student's future readiness.

Position Summary

The Chief Financial Officer (CFO) is the District's senior executive responsible for financial strategy, stewardship, operations, and assurance. Reporting directly to the Superintendent and serving as a key member of the Superintendent's Executive Cabinet, the CFO advises the Superintendent and Board of Directors on the District's financial condition, long-range outlook, risks, opportunities, and the financial implications of strategic and operational decisions.

The CFO leads the Financial Services division and is accountable for accurate, timely, transparent, and compliant financial operations. The role aligns resources with the District's Strategic Framework and educational priorities; builds organizational financial capacity; develops a high-performing, service-oriented team; and advances systems and practices that strengthen fiscal sustainability, operational excellence, and public trust.

Lake Washington School District is committed to building an inclusive, equitable, and welcoming environment for all students and staff. We welcome candidates from all backgrounds and life experiences who share our commitment to educational excellence and equity. We especially encourage applications from individuals who have been historically underrepresented in education.

Executive Leadership Expectations

The CFO is expected to bring both technical depth and executive judgment. The successful leader will:

- Exercise exceptional attention to detail while maintaining a districtwide, long-term perspective.
- Develop a deep understanding of District operations, instructional priorities, labor commitments, enrollment dynamics, funding structures, and community expectations.
- Approach unfamiliar issues with curiosity, humility, and a disposition to learn, asking insightful questions before reaching conclusions.
- Provide the Superintendent with candid, evidence-based counsel; respectfully challenge assumptions and surface risks, alternatives, and unintended consequences.
- Engage in vigorous dialogue and principled disagreement when appropriate, then support and faithfully execute final decisions once they are made.

- Communicate complex financial matters with clarity, context, and transparency for audiences with differing levels of financial knowledge.
- Model integrity, reliability, discretion, accountability, collaboration, and measured leadership, particularly in high-stakes or ambiguous situations.
- Act as an enterprise leader whose responsibility extends beyond the Financial Services division to the success of the entire District.

Strategic Framework Alignment

The CFO will translate the District's values and strategic commitments into financial leadership and daily practice:

Framework Element	Leadership Application
Equitable & Just Systems	Use accurate fiscal analysis and transparent resource-allocation processes to identify barriers, support equitable and consistent access and opportunity, and clearly explain the impacts of significant decisions. Bring integrity, curiosity, and inclusive engagement to the evaluation of needs, options, and outcomes.
Inclusive & Rigorous Learning	Connect financial plans and investments to student learning, whole-student development, future readiness, and the capacity of schools and staff to provide inclusive, rigorous experiences. Engage instructional and operational partners in understanding priorities, tradeoffs, and results.
Integrated Sustainability	Balance immediate needs with long-term financial health, responsible stewardship of public resources, workforce and organizational capacity, lifecycle costs, and the sustainability of District programs, facilities, systems, and commitments. Advance resource conservation management and environmental sustainability by evaluating proposed updates and modifications for environmental benefit, cost-effectiveness, lifecycle performance, and a responsible return on investment.
Operational Excellence	Establish reliable and responsive financial services through clear expectations, strong internal controls, accurate and accessible reporting, effective technology, collaborative problem-solving, and continuous improvement. Model accountability, innovation, learning, and follow-through.

Essential Responsibilities

Strategic Financial Leadership and Executive Advising

- Lead the development and execution of long-range financial strategies aligned with the District's mission, Strategic Framework, educational priorities, enrollment outlook, workforce plans, and operational needs.
- Advise the Superintendent, Executive Cabinet, and Board of Directors on financial policy, resource allocation, budget priorities, material risks, and long-term implications of proposed decisions.
- Provide independent, candid, and timely analysis; identify options, opportunities, and tradeoffs; recommend a course of action; and support implementation of final decisions.
- Serve as a key contributor to districtwide strategy, organizational planning, labor strategy, major initiatives, change management, and response to emerging conditions.
- Monitor legislative, economic, demographic, and funding developments affecting Washington public schools and translate them into actionable guidance.

- Analyze proposed state and federal legislation, assess its financial and operational implications, and support the Superintendent and Board in developing informed legislative priorities and communications. Represent the District with legislators, agencies, and professional associations on financial matters as assigned.
- Lead the development, review, and continuous improvement of financial policies, administrative procedures, standards, and practices to strengthen clarity, compliance, efficiency, consistency, and accountability.

Budgeting, Forecasting, and Resource Allocation

- Lead preparation, presentation, implementation, and monitoring of the District's annual budget (both state required F-195 and Meritorious Budget Award criteria) and multi-year financial forecast.
- Establish clear assumptions, baseline and comparative data, forecasts, scenarios, controls, timelines, and communication processes that support evaluation of needs, alternatives, tradeoffs, and long-term financial implications.
- Analyze revenues, expenditures, staffing, enrollment, commitments, variances, and emerging conditions; recommend timely adjustments and mitigation strategies.
- Integrate enrollment projections, staffing models, position control, compensation assumptions, program commitments, and other expenditure drivers into short- and long-range financial planning.
- Establish and maintain effective position-control processes in partnership with Human Resources to ensure that staffing authorizations, budgeted positions, compensation commitments, and actual staffing remain aligned and financially sustainable.
- Design and oversee resource-allocation processes that align resources with established priorities and strengthen fiscal sustainability.
- Support collective bargaining strategy through costing, forecasting, scenario analysis, and evaluation of the short- and long-term financial implications of proposals and agreements.
- Build the financial knowledge and capacity of principals, department leaders, and budget managers through guidance, tools, training, and consultation.

Accounting, Payroll, Benefits, and Financial Reporting

- Provide executive oversight of accounting, payroll, benefits administration, accounts payable and receivable, general ledger, inventory accounting, capital fund analysis, and required financial reporting.
- Provide executive oversight of grants, restricted funds, Associated Student Body financial activity, and other designated funds and accounts, ensuring appropriate controls, allowable expenditures, accurate reporting, and compliance with applicable requirements.
- Ensure financial records and reports are accurate, complete, timely, transparent, and maintained in accordance with GAAP, GASB standards, Washington requirements, and applicable federal rules.
- Ensure reliable reporting to the Superintendent, Board, regulatory agencies, leaders, staff, and the public, with explanations that make complex information understandable and useful for decision making.
- Oversee cash-flow planning, investments, debt-related financial administration, reserves, and other treasury functions as assigned.

Internal Controls, Audit, Compliance, and Risk

- Establish and maintain a districtwide financial governance and internal-control framework that safeguards assets, promotes accountability, and supports reliable operations and reporting.
- Coordinate annual external audits and other financial reviews; ensure responsive corrective action, documented follow-through, and continuous strengthening of controls.
- Ensure compliance with applicable local, state, and federal laws; grant and funding requirements; Board policies; administrative policies; contracts; and District procedures.
- Ensure appropriate fiscal oversight and compliance for grants, restricted revenues, Associated Student Body funds, capital funds, and other specialized funding sources.
- Identify and communicate financial, operational, compliance, and implementation risks early, with practical mitigation options.

Purchasing, Contracts, and Financial Systems

- Provide executive leadership for purchasing and procurement, supporting fair, transparent, compliant, and effective acquisition of goods and services.

- Provide financial review and strategic guidance for significant contracts, interlocal agreements, capital commitments, and major investments.
- Establish and maintain consistent processes for the financial and compliance review of significant contracts, agreements, procurements, and long-term commitments before District approval.
- Lead modernization and continuous improvement of Enterprise Resource Planning (ERP), payroll, budgeting, reporting, procurement, and related financial systems in collaboration with Technology and other departments.
- Use data governance, documentation, process design, and performance measures to improve accuracy, efficiency, security, transparency, and service delivery.
- Ensure that financial systems, procedures, documentation, and training support the needs of authorized users while maintaining appropriate access, security, segregation of duties, and internal controls.

Capital and Long-Term Financial Planning

- Provide financial leadership for capital programs, levy and bond planning, debt obligations, capital reserves, and long-term facilities planning, including revenue and tax modeling, debt-capacity analysis, issuance strategy, bond sales, and post-issuance compliance.
- Integrate capital and operating forecasts so that project decisions account for lifecycle costs, staffing, maintenance, and long-term affordability.
- Develop and maintain financial models and analyses that support levy, bond, capital funding, and property-tax decisions and clearly communicate their implications to the Superintendent, Board, and community.
- Ensure compliance with applicable bond, debt, tax, reporting, and expenditure requirements and maintain effective relationships with financial advisors, underwriters, rating agencies, and other partners.
- Provide financial analysis and strategic guidance related to the acquisition, disposition, financing, or long-term use of real property when such matters are under consideration by the District.

Communication, Engagement, and Public Trust

- Serve as a primary District spokesperson on financial matters and present clear, accurate, accessible information to the Board of Directors and community.
- Prepare high-quality financial reports, Board materials, recommendations, and presentations that clearly distinguish facts, assumptions, risks, options, and decisions.
- Engage schools, departments, labor partners, families, community members, and external agencies in ways that foster understanding, transparency, and trust.
- Lead or facilitate District committees, advisory groups, and engagement processes related to financial planning, levies, bonds, capital finance, and other assigned areas of responsibility.
- Represent the District professionally with auditors, governmental agencies, financial institutions, professional associations, vendors, and community partners.

Organizational and Team Leadership

- Lead the Financial Services division, establishing clear priorities, roles, service expectations, accountability, and a culture of collaboration and continuous improvement.
- Supervise, coach, develop, and evaluate assigned leaders; strengthen succession planning, professional growth, team capacity, and cross-functional collaboration.
- Ensure effective coordination among budget and fiscal management, accounting, payroll and benefits, purchasing, and related financial-service functions.
- Create a service-oriented partnership with schools and departments that combines responsiveness with consistent controls and sound stewardship.
- Establish goals, performance measures, service standards, and continuous improvement processes that support the effectiveness, efficiency, accessibility, and accountability of Financial Services.
- Perform other duties and lead special projects consistent with the scope and responsibility of the position.

Financial Services Division Scope

The CFO provides executive leadership for the Financial Services division. The division includes the following major functions:

- Budget and fiscal management, including enrollment, capital fund, general fund, and inventory analysis
- Accounting, including general ledger, accounts payable and receivable, internal controls, and financial reporting

- Payroll and benefits administration
- Purchasing and procurement
- Grants, restricted funds, and related fiscal compliance
- Associated Student Body financial oversight, as assigned
- Levy, bond, debt, investment, and treasury administration
- Administrative support and coordination
- Financial coordination with Nutrition Services and other operational partners, as assigned

Required Knowledge, Skills, and Abilities

- Expert knowledge of public-sector finance, budgeting, accounting, auditing, internal controls, financial reporting, procurement, and long-range forecasting.
- Working knowledge of Washington public-school funding, accounting, reporting, and compliance requirements, or the demonstrated ability to acquire this knowledge rapidly.
- Advanced analytical ability, including scenario modeling, risk analysis, synthesis of complex information, and development of actionable recommendations.
- Knowledge of position control, staffing and compensation modeling, enrollment forecasting, grants and restricted-fund administration, and the financial dimensions of collective bargaining.
- Knowledge of levy and property-tax modeling, bond and debt administration, capital finance, and post-issuance compliance.
- Exceptional accuracy, organization, follow-through, and attention to detail without losing sight of strategic purpose.
- Ability to ask incisive questions, test assumptions, identify inconsistencies, and explain consequences clearly and respectfully.
- Ability to engage in constructive disagreement, provide courageous counsel, exercise sound judgment, and operate effectively after a final executive decision is made.
- Ability to communicate financial information clearly in writing, presentations, dialogue, and public settings for technical and nontechnical audiences.
- Ability to lead through ambiguity and change, manage multiple high-priority initiatives, and produce timely, reliable results.
- Ability to build trust and collaborative relationships across functions, roles, perspectives, and communities while maintaining appropriate boundaries and confidentiality.
- Ability to lead, develop, and hold teams accountable while fostering learning, inclusion, shared leadership, and excellent service.
- Knowledge of enterprise financial systems, data governance, cybersecurity considerations, and effective technology-enabled process improvement.
- Ability to interpret proposed legislation, regulations, policies, collective bargaining agreements, and contractual commitments and assess their financial and operational implications.
- Commitment to the District's mission, vision, values, strategic commitments, and responsibility to serve every student.

Minimum Qualifications

- Bachelor's degree in accounting, finance, business administration, public administration, or a closely related field.
- At least eight years of progressively responsible experience in financial management, accounting, budgeting, business administration, or a related field within a complex organization.
- At least five years of successful leadership and supervisory experience with responsibility for multiple financial or operational functions.
- Demonstrated experience advising executive leaders and presenting complex financial matters to a board, governing body, or comparable public decision-making group.
- Demonstrated knowledge of GAAP, GASB standards, internal controls, budgeting, audit, and financial management.
- Any equivalent combination of education and experience that demonstrates the ability to perform the essential responsibilities of the position.

Preferred Qualifications

- Master's degree in accounting, finance, business administration, public administration, education leadership, or a related field.
- CPA, SFO, CPFO, CGFM, CMA, or another advanced certification relevant to governmental or public-sector financial leadership.
- Senior financial leadership experience in a public-school district, governmental agency, or similarly complex public-sector organization.
- Deep knowledge of Washington K–12 school finance, state funding formulas, budgeting and accounting requirements, levies, bonds, and legislative processes.
- Experience with position control, enrollment and staffing forecasting, compensation modeling, and long-range workforce planning.
- Experience supporting collective bargaining through costing, forecasting, scenario analysis, and evaluation of financial implications.
- Experience in a large, complex, unionized organization and experience providing financial analysis in support of collective bargaining.
- Experience leading ERP modernization, systems implementation, or significant financial-process redesign.
- Experience with capital finance, debt management, grants, procurement, payroll, benefits, and audit oversight.
- Experience with levy and property-tax modeling, bond issuance, debt administration, and post-issuance compliance.

Leadership Characteristics

Characteristic	What It Looks Like
Strategic and Systems-Minded	Connects financial decisions to teaching, learning, operations, workforce, facilities, technology, and long-term organizational health.
Curious and Learning-Oriented	Seeks context, studies unfamiliar issues, asks insightful questions, and updates thinking when evidence changes.
Courageous and Constructive	Raises concerns directly and respectfully, offers alternatives, and does not allow avoidable risks or weak assumptions to go unexamined.
Aligned and Dependable	Understands the distinction between debate and decision; once a decision is final, communicates and implements it consistently and effectively.
Precise and Thorough	Maintains high standards for accuracy, documentation, controls, analysis, and follow-through.
Transparent and Accessible	Makes complex matters understandable, distinguishes known facts from assumptions, and communicates uncertainty honestly.
Collaborative and Inclusive	Listens to understand, honors differing expertise and perspectives, and builds shared ownership across the organization.
Accountable and Ethical	Acts with integrity, safeguards public resources, protects confidentiality, owns outcomes, and models responsible stewardship.
Composed and Adaptive	Maintains perspective and sound judgment under pressure, adjusts to changing conditions, and helps others navigate ambiguity.
Service-Oriented	Designs Financial Services to be responsive, consistent, solution-focused, and

Characteristic	What It Looks Like
	supportive of schools and departments.

Working Conditions and Other Requirements

- Executive, full-time, year-round position with regular attendance at evening Board meetings, public meetings, and District events.
- Ability to travel between District locations and attend meetings throughout the region as required.
- Successful completion of required background checks and other employment clearances.
- Regular and reliable attendance and the ability to perform the essential functions of the position, with or without reasonable accommodation.

General Statement

This job description describes the general nature and level of work assigned to the position. It is not an exhaustive list of all duties, responsibilities, qualifications, or working conditions. The District may assign or reassign duties and responsibilities consistent with the scope of the position and applicable law. Lake Washington School District is an equal opportunity employer and provides reasonable accommodations in accordance with applicable law.