

## CANDIDATE PROFILE

**Director of Finance & Operations**  
Carlouel Beach and Yacht Club  
Clearwater Beach, Florida

[www.carlouel.net](http://www.carlouel.net)



[Click here to watch a short video.](#)

### Organization

Situated between the white sand beaches of the Gulf of Mexico and the Intracoastal Waterway on Florida's west coast, Carlouel Beach and Yacht Club is a private, full-service, family-oriented club dedicated to providing members with superb dining, recreational activities, and a vibrant social atmosphere.

Originally founded in 1934 by Theron R. Palmer and Garrett A. Hobart, Carlouel began as a small cabana club. One hundred local families were invited to join, each paying one hundred dollars in annual dues. Paul F. Randolph assembled the real estate that became the Club property and adjacent home sites. When the issue of naming the Club was discussed, it was easily solved by combining the first syllables of the names of the founders' wives - Caroline Hobart, Louise Palmer, and Eleanor Randolph. The Club was thus named Car-lou-el.

Over the years, membership has grown to approximately 500 active members. It was not until 1954 that Carlouel functioned twelve months of the year. Prior to that time, it was open for the winter months only. However, dances, picnics, and great camaraderie were evident during World War II. In the beginning, Carlouel was an active yacht club, but with the closing of the Caladesi Pass after Hurricane Elena in 1985, along with the dredging for Island Estates to the southeast, access to the waterways was made difficult.

In the mid-1950s, a fire destroyed part of the Carlouel's original structure. During the reconstruction, the decor changed from casual to a more formal appearance. Later improvements included enclosing the bay front terrace, adding the Palmer Room, building a sea wall, roque court, swimming pool, tennis courts, and additional cabanas. The short-course Olympic pool was added in 1962.

## Amenities

- Main Dining Room, serving lunch and dinner Wednesday through Sunday.
- The Randolph Room, offering adult-only dining on Friday and Saturday evenings.
- Members Bar, serving lunch and dinner Wednesday through Sunday.
- Beach food and beverages are offered on Saturday and Sunday for lunch during the season.
- Har-Tru tennis court with lights for night play.
- Club-owned boat docks, with 30 and 50-amp electrical service.
- Two swimming pools, one of them heated for year-round availability.
- The Birdcage, an outdoor venue offering lunch and dinner year-round.
- Private, member-only boardwalk and beach with chair/umbrella service.
- Private dining accommodating 250 guests, offering the only private beach in Clearwater, ideal for the perfect backdrop for wedding ceremonies.
- 500 members with dues revenue of \$3.75 million and annual food and beverage sales of \$2.5 million.
- Club uses Jonas as the operating system and Clubessential as the webmaster.

## Responsibilities

The Director of Finance and Operations (DFO) position reports to the General Manager and plays a pivotal role in shaping the financial strategy and ensuring the overall financial health of the organization. This position is responsible for providing leadership and coordination of the Club's financial planning, debt financing, and budget management functions and ensuring the accounting and internal control procedures and reporting conform to the generally accepted accounting principles. Primary duties involve oversight of the Club's financial health, including processing tax procedures, all HR duties (payroll, benefits, staff on/off-boarding, 401(k), HSA) Property and Casualty insurance, member service/support, and overall IT management, with third-party support.

The position accomplishes this through a respectful, constructive, and energetic style, guided by the objectives of the community. This position should excel in operational efficiencies to be able to assist the managers in the successful operation of their departments. Operations experience is important as this position will serve as the "second in command" for the General Manager.

- Responsible for the delivery of cost-effective and efficient accounting and financial systems, policies, and processes that meet the current and future business needs of the Club.
- Provide financial planning and analysis and funding analysis.
- Develop and implement financial plans, budgets, and forecasts.
- Evaluate existing accounting department personnel structure and assist with hiring, training, performance coaching, and disciplining department employees within approved HR policies and compliance with governmental agencies.
- Proactively prevents material weaknesses in the annual audit.

- Develop regular reporting and analysis, including key metrics reports.
- Lead operating, reserve, and capital budget process, working with the GM and department heads to revise and adhere to budgetary guidelines.
- Provide basic project management information for reserve project spending and funding.
- Process fines and delinquent accounts and oversee collections.
- Work with the Treasurer, volunteer Finance Committee, GM, and the Management Team in the preparation of the yearly budget.
- Oversee the external audit, review and analyze results, and recommend for approval the Audited Financial Statements.
- Treasury, insurance, and planning. Oversee daily processing and reconciliation of general ledger accounts.
- Responsible for documenting and ensuring compliance with internal control procedures.
- Lead timely outlook forecasts and work with the GM and Management Team to address variances and meet overall budget targets.
- Provide ongoing financial modeling and analysis expertise to support the development of long-term strategic initiatives and business plans.

## Requirements

- Certified Hospitality Accounting Executive (CHAE) recommended.
- Certified Public Accountant (CPA) license preferred.
- Bachelor's degree in Finance and/or Accounting from a four-year college or university.
- Five to seven years of professional accounting experience with at least two of those years at the Controller level or equivalent in an association operation.
- Continuing education related to amendments and revisions to club accounting procedures is preferred.
- Previous management and employee relations experience required.
- Excellent communication skills are essential, particularly in presenting the results of analyses to management, and should have an outstanding knowledge of electronic spreadsheets.
- Experienced with financial accounting software applications such as Jonas and spreadsheet applications such as Microsoft Excel.
- CMAA Member working toward CCM is a plus.
- HFTP Membership is a plus.

## Competitive Compensation

- A competitive base salary with a performance bonus
- Individual health insurance, dental, vision. Family plans available
- Employer-paid Group Term Life Insurance
- 401(k) plan with employer match
- Relocation assistance provided
- Support for continuing education and professional association dues
- Employee meals provided

Individuals who meet or exceed the established criteria detailed in this position profile and posting are encouraged to send both a cover letter and a resume.

Note: The preferred method of contact is email. Please send your cover letter and resume in PDF format, attached via email with the subject line: Carlouel DFO



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