

Like an earthquake or the retreating water before a tsunami, there are signs that a massive wave of disruption is on the verge of shaking up the independent school operational landscape. Price-sensitive families, powerful technologies and shifting demographics have brought new and often cheaper competition. Compliance challenges are mounting, deferred campus maintenance demands attention. And an aging finance and operational workforce foretells tremendous leadership turnover. Members of NBOA “have an average of 28.7 years of

professional experience,” wrote Jeff Shields, NBOA’s president and CEO, in a recent newsletter column. “Couple that number with the fact that we are largely a ‘mid-career’ profession, and it’s easy to surmise that a vast majority of our members will fuel a trajectory of mass retirements in the very near future.”

With the forecast clear, it’s time to prepare. Who will suit up for the next generation of leadership? What challenges will they inherit? What skills and attributes will they need to ride the wave successfully?

By Donna Davis, Stacey Freed and Leah Thayer

THE NEXT GENERATION OF

LEADERS



THE BOTTOM LINE

- Begin succession planning well in advance to prepare for unforeseen challenges and reveal gaps in knowledge and skills.
- Silos are out; collaboration and group scenario-building are in.
- “Selling” potential leaders on the intangible benefits of independent schools can help balance the for-profit/nonprofit pay gap.

RSHP



Change has become so rapid and unpredictable that I don't know anyone who can do a financial model that's any good for more than three years."

—Vanessa Wassenar,
Creating Resilient Schools

MASTERS OF REINVENTION

As longtime independent school leaders retire, their successors will step into dramatically different circumstances. What will they (or you) need to be successful?

Collaborative, nimble, strategic, somewhat visionary: Rising independent school business leaders will certainly need these attributes. But let's start by dispensing with the myth of the perfect leader. "There's a real danger in looking for a 'white knight' to solve the challenges our schools face," according to Philip Cork, assistant headmaster for finance and assistant treasurer at St. Andrew's School in Boca Raton, Florida. While top talent is critical, "this is a team effort," he added. The better question is, "How do you build a team with the needed complementary attributes and skills for the future?"

Collaboration is inherent in that process. "The business officer graveyard is filled with business officers who went in and told the faculty, 'We are going to start running this place like a business,'" said Jeff Shields, NBOA's president and CEO. "The business officer has to drive change and introduce business concepts in a servant-leadership sort of way."

Cork agrees. "The days of business officers existing in a separate silo and only interacting with others about numbers is over." He believes it's important for business officers to spend some time in the classroom, "interact with students and understand the spaces in which teachers are teaching. It can give you a good perspective on what [teachers] would like to see. It's a matter of value and not dollars."

Nishant Mehta seeks that kind of collaboration at The Children's School

in Atlanta, where he is head of school. He holds a weekly administrative team meeting in which everyone must come prepared to discuss a particular assigned article all have read. Or he uses an actual case study of something occurring at the school. "Whether you are or were part of it, you have an opportunity to get access to it and problem-solve an issue as a team," he said.

Training and coaching are critical, Mehta said. As roles shift and staff grapple with more responsibilities and challenges, it's an opportunity to coach and mentor "to improve team development, collaboration and problem-solving skills."

Other attributes include the ability to identify trends and adapt nimbly. So rapid and unpredictable has change become that "I don't know anyone who can do a financial model that's any good for more than three years," said Vanessa Wassenar of Creating Resilient Schools.

"Any predictions about the future are just that," agreed change management consultant Howard Teibel, whose clients include independent schools, colleges and universities. "I think any conversation about being prepared for the future needs to include the acknowledgment that we're good at short-term decisions (getting through the next one- to three-year budget cycle) but are wholly unprepared to think 10 years down the road." To better prepare for change, he prefers "group scenario building" in which designated leaders from different perspectives (finance, facilities, enrollment

MORE FROM NBOA

2016-2017 Business Office Compensation and Staffing Survey
go.nboa.org/Comp-and-Staffing

2014-2015 Business Office Survey Report
go.nboa.org/BizOfficeSurvey

Smooth Moves: Orchestrating a Successful Head of School Transition
go.nboa.org/HeadOfSchoolTransition

A Delicate Balance: the Rise of the Chief Risk Management Officer
go.nboa.org/SchoolRiskManager

53.4

Average age of NBOA members
(2014-15 NBOA Business Office Survey Report)

56

Average age of higher-ed business officers
(NACUBO's 2016 National Profile of
Higher Education Chief Business Officers)

58.6

Average retirement age of Fortune 500 CFOs
(SpencerStuart)

management, etc.) map out various scenarios, taking history into account, “and then asking, ‘How would we handle each of these if they came into being?’”

STRATEGIC COMMUNICATORS

What skill sets will the next generation of leaders need? When it comes to the chief business officer, independent schools face so many complexities that “you have to be a number interpreter and not a number cruncher and see how it fits into the strategic plan,” said Chuck McCullagh, CFO at Williston-Northampton School in Northampton, Massachusetts. “A whole area of compliance and risk management has taken on a life of its own and is now piled onto financial and operations management.”

On the one hand, larger schools may opt to divide the CFO’s financial and operational responsibilities into separate, more specialized roles. “Now you’re seeing independent schools starting to look more like universities,” said McCullagh. “There’s someone handling the financial side and then someone handling the physical plant.” One specialized leader might be accountable for financial

management, including employee benefits and retirement planning, for instance, and another for operations, risk management and project management.

On the other hand, leaders should be able to see the big picture and think strategically. Cork foresees growing value for the CFO “who understands the current pedagogy in the school and how it needs to change, and what it takes to deliver on the expectation of providing students with both the skills for, and love of, lifelong learning.” And he believes all leaders should support professional and personal development, for themselves and their staff. “This is an important aspect of leaders’ lives.”

Communication skills continue to gain currency. School leaders — ideally, all staff and faculty — should understand and be able to articulate the value proposition like never before. “The previous generation of business managers assumed the value proposition was a given: ‘We’re a great school; people won’t stop paying our tuition,’” said Brad Rathgeber, executive director of One Schoolhouse, which provides online learning for students and adult learners. “But that’s called into question a little bit now because the [tuition] is so high. The CFO has to understand the value proposition in a way they might not have had to before.”

Underlying all of this is a simple fact: “Meeting the increasing expectations of our customers is an expensive proposition,” said Cork. These demands raise the bar for people-management skills. Within the parental pool may be challenging characters like “snowplow parents who clear the path so their kids can’t trip and fall,” said Paul Ibsen, who came out of retirement last year to be the interim head of school at Greensboro Montessori School in Greensboro, North Carolina. “Teachers and administrators are going to need to know this behavior is more of the norm for a lot of parents. How will you communicate and deal with parents who need to know every single thing?”

Feature continues on page 24. 

THE NEW GUARD



ROCHELLE HARGRAVES

St. Patrick's Episcopal Day School
(Washington, D.C.)

Job title and start: Assistant head of school for finance and operations, July 2016

Previously: Six years as CFO at the YWCA of the National Capital Area, preceded by nine years in finance and operations at other nonprofits.

Surprised by: “The genuine desire to collaborate within the school and wider community. Idea sharing is valued, and feedback comes from a place of authentic interest for the well-being of the community at St. Patrick’s and for me as a professional.”

Advice for schools anticipating a leadership change: “Develop a thorough succession plan well in advance of the leader’s departure. Not only does the process prepare the school for unforeseen changes, but it also brings to light any gaps in knowledge and skills, and highlights the need to compensate for those. More importantly, it can serve as an onboarding tool for the incoming leader and help transfer some of the institutional knowledge that otherwise would have been lost. Second, when the time comes to fill that leadership role, commit to casting a wider net. If the cultural fit exists and the technical competence is evident, be open to hiring a leader that does not have independent school professional experience. Finally, send your new leader to the NBOA Business Officer Institute [offered every June] as part of their onboarding. I found this to be an incredibly valuable training opportunity. It laid a foundation of not only field-specific knowledge but also opened the doors to a professional support system.”

IS YOUR BOARD REALLY ON BOARD?

Before getting too invested in bold new leadership, consider the degree to which your board will support real change. “Schools that are prepared to face these challenges need top talent willing to shake things up,” said Howard Teibel of Teibel, Inc. “Part of the story includes the school’s culture and willingness to face tough issues. Some cultures are not [willing], and they could get the wrong talent as a result.” If your board does not foresee imminent risk and therefore does not want significant change, you can expect to see incremental change at best. But “if the board wants ‘big ideas’ and is willing to rethink the model, you need a different set of talent.”

FILLING THE PIPELINE

How to identify and attract your next-generation leaders? Cast your net wide, and prepare for competition.

What if there are no obvious candidates on tap to take over the senior finance/operational reins?

Long tenures and promoting from within are hallowed traditions at independent schools — with the notable exception of senior finance positions, which are often filled by second-career professionals. Expect for-profit companies, higher education and other nonprofit sectors to become even more popular launch pads as schools seek increasingly sophisticated analytical skills and specialized knowledge.

Start with some recruitment fundamentals, recommends Doug Cooney of Deerfield Associates Executive Search. Define what you want out of a hire, learn how to package and market the opportunity, have an excellent interview team on campus, engage the candidate — and sell them on the job. “The more personalized the search, the more effective.”

Feature continues on page 28. 

THE NEW GUARD



ANDREA SABITSANA
Greenwich Academy (Greenwich, Connecticut)

Job title and start: Chief financial officer, August 2016

Previously: Higher education finance with responsibilities including accounting, budgeting, financial reporting and taxes.

Attraction factor: “Being the product of an all-girls education and the mother of three young girls, Greenwich Academy’s mission Toward the Building of Character really appealed to me. I was excited to be part of a smaller environment in an independent school and was impressed by the culture of innovation and continuous improvement.”

Surprised by: “Despite the high expectations that come with an independent school, the culture is extremely warm and inviting. I was also impressed with the level of engagement of the trustees, current parents, faculty and staff striving towards the common goal of ‘What is best for our girls?’”

THE NEW GUARD



GAIL SCHULMAN
Gann Academy (Waltham, Massachusetts)

Job title and start: Chief operating officer, May 2016

Previously: COO in a global high-tech company.

Attraction factor: “I wanted to apply my business skills in an environment in which I felt I could truly give back, and in an organization whose mission inspired me.”

Surprised by: “You can call it a CFO job, but it is so much more than finance — it encompasses everything from rethinking our physical spaces and ensuring support for our technology to making sure the buses run on time and advising students in the business club.” Also: “the hands-on nature of running a very small business office compared to a well-resourced business in the corporate environment; the complexity of an environment where our ‘customers’ are also our donors and our volunteers; how inspiring it is to work with leadership, colleagues and staff who are committed to the school’s mission and who use their creativity to advance that mission.”



THE NEW GUARD



C. BEAR PAUL

National Presbyterian School
(Washington, D.C.)

Job title and start: Chief financial officer,
July 2016

Previously: Business manager at a charter school. Has also been a classroom teacher, assistant director of a middle school, coach and occasional bus driver.

Attraction factor: “My wife attended NPS and still tells stories of how warm a community it was. On my visit in the spring, I was delighted to find that the school remained the wonderful place she described. The board of trustees, faculty, staff and parents are engaged and committed to maintaining a remarkably warm and caring school environment.”

Surprised by: “How much I love working in an elementary school. My previous school professional experience has all been at the middle school and high school levels. This is my first time working in an exclusively elementary school. I feel lucky to be here.”

This is especially true for positions so new they have no precedent or career path. Gabriel Lucas recently conducted a search for a “knowledge hub manager” at a school. “Who has been that before?” asked the principal of Ed Tech Recruiting and co-founder of ATLIS (Association of Technology Leaders in Independent Schools). “Who has run a library, been an innovation and curriculum manager and served as a director for all things technology?” By and large, “there’s just not a deep pool” within independent schools to handle the shift to academic and curriculum design. “Quite often we have found the top candidate is not the typical rising-up-the-ranks independent school technology leader.”

THE NEW GUARD



MELANIE JOHNSON

Lick-Wilmerding High School (San Francisco)

Job title and start: Chief financial officer,
July 2015

Previously: CFO at a community-based nonprofit providing housing and services to very low-income and homeless individuals and families. Finance and operations work in not-for-profit and for-profit organizations.

Attraction factor: “The school’s commitment to teaching students to participate in and contribute to the broader community.”

Surprised by: “Just how much can be packed into a day at Lick-Wilmerding, as the school is bursting with an impressive array of collaborative, inspirational, artistic, philanthropic and fun learning opportunities throughout the year.”

Begin succession planning well in advance of a search. Cast your net wide — possibly even nationally or internationally. Define the key priorities and skill sets needed and wanted in the role going forward. Cooney said his typical independent school CFO search might involve as many as 300 calls to potential candidates and referral sources within what he calls his “Doug Club” — well-placed individuals in relevant spheres. Wining names to a final list of candidates might take three to four months, depending on the pace of the institution hiring, with that roster typically including one to two individuals from independent schools and the rest from higher education, other not-for-

THE NEW GUARD



ANN VISALLI

St. Andrew's School (Middletown, Delaware)

Job title and start: Chief operating officer,
May 2016

Previously: Director of the office of management and budget for the state of Delaware.

Surprised by: “How welcoming and supportive the entire school community has been.”

Advice for schools anticipating a leadership change: “Communicate with everyone about how positive the experience can be. Support new leaders by sharing experiences from others who have transitioned into the school recently as well as from those who can share the long and rich history of the school and its culture. Both perspectives are incredibly important.”

profits, financial services and consulting disciplines, he said.

Jane Armstrong, managing partner of education search firm Independent Thinking, sometimes supplements advertised searches by going through schools’ alumni databases — for instance, seeking an MBA alumnus who has been involved with the school. Your school’s audit firm might also have sources, she said.

In any case, prepare for competition. In a hypothetical search for a smart, strategic and dynamic school CFO, it’s likely that “the person they want is in much demand not only by education but by other sectors. You have to broaden your sphere to get the best talent,” Cooney said. Armstrong surmised that



such talent is also ambitious and looking for advancement potential. “Tomorrow’s administrators are presenting themselves with terrific credentials,” she said, noting professional development programs from NBOA as well as NAIS, regional independent school associations and specialized offerings from the likes of Harvard and the Klingenstein Center at Columbia University’s Teachers College.

NEW ENERGY FROM WITHIN

Could your next-gen leaders be closer to home — perhaps among existing employees, trustees or parents? “Some talent should be home-grown,” said Frank Aloise, chief financial officer at Springside Chestnut Hill Academy in Philadelphia. “They know the culture of the school.” But while the business office might seem like an obvious training ground for a business officer, that’s not

THE NEW GUARD



LINDA MACLEAN
Marist School (Atlanta)

Job title and start: Vice president, finance, February 2015

Previously: 20 years in leadership positions at UPS. Began in public accounting at a (then) “Big Eight” firm.

Attraction factor: “My three children graduated from Marist and I was on the Marist board of trustees. It has been an important part of my family’s life, and I wanted to contribute in some way.”

Surprised by: “The variety of issues that have come across my desk, large and small. I am also learning a lot of interesting and thought-provoking things from students and faculty that I hadn’t been exposed to before.”

always the case, said Jeff Shields, NBOA’s president and CEO. For instance, while the controller might seem the likely choice for succession, “controllers don’t necessarily desire to be the business officer, just as the business officer doesn’t necessarily have the desire to be the head of school.”

Likewise, longtime leaders who retire and then go into consulting don’t always

bring the “new thinking necessary for success in the future,” said Philip Cork, assistant headmaster for finance and assistant treasurer at St. Andrew’s School in Boca Raton, Florida. Rather, “our schools will thrive because we develop people from within who are eager to learn new skills and apply them.” **N**

Feature continues on page 32.

ANTICIPATING RETIREMENTS, GLEANNING INSTITUTIONAL KNOWLEDGE: One School’s Approach

By Kitty Schainman, Catlin Gabel School

Our school is going to be facing the double impact of key financial officers and facilities personnel retiring in the next few years. We will be missing their collective 60-plus years of experience with our institution. While the loss of their experience and knowledge will be sorely missed, my greater concern is two-fold: the loss of solid working relationships and the dearth of skilled middle-career managers and technicians to fill the voids. Regrowing relationships and training-up novices takes an investment in time and resources. It also puts a greater burden on those who aren’t retiring.

We are moving forward proactively to glean as much insight and institutional knowledge as possible from these folks now. Annual staff reviews will now include maintaining an annual calendar of planning and tasks related to each job. Not work orders or preventive maintenance, but the seasonal planning and thought processes that have become habit over the years.

We are also attempting to get funding into our operations budget to cover the huge expenses that come when an established person is succeeded by a new employee: professional training, licensing and, most importantly, planned months of overlap with the replacement person. As a small school (750 students but 32 buildings and 60-plus acres), we rely so much on individual specialists (one HVAC, one mechanic, one electrician) because we have little redundancy. I am adamant that to ensure a successful transition and a seamless transfer of knowledge, we have to have a lengthy training and vetting period. We must make sure we have the right replacement before the veteran retires. Several times we have hired a person who became overwhelmed, disenchanted or lured away. This left us with no knowledge transfer at all and a much longer and more costly recovery time.

Wish me luck, and put out the word that there is great value in investing in the people who manage the school’s physical and financial health.

Kitty Schainman (at right) is facilities manager at Catlin Gabel School, Portland, Oregon.



MONEY MATTERS



It's all about the match both for the organization and the individual. That means affinity interests, strengths, work-life balance, location, culture, and of course, salary. It's the whole package."

—Doug Cooney,
Deerfield Associates
Executive Search

But so do mission and quality of life. "Feeling good about your work is a driving force."

When it comes to recruiting financial leaders, compensation is "a hard topic" that is critical to discuss, according to Doug Cooney of Deerfield Associates Executive Search. Competition may be fierce, given high demand in all sectors for professionals with expertise both broad and deep. Heads of school in particular need to recognize this, lest their expectations price them out of the market. Thankfully, trustees, who often have corporate experience, may not be as surprised. "When you say the replacement has to be paid 30 to 35 percent more than the incumbent who's retiring, the trustees are most of the time cognizant of the demands and challenges going on in the market for top-tier talent," Cooney said.

NBOA's 2016-2017 Business Office Compensation and Staffing Survey Report bears out that top leaders are asking for, and often getting, top pay. "Schools understand that this role is more sophisticated and it's a leadership role," said NBOA President and CEO Jeff Shields. "We're seeing that in titles and also in salaries." In the report, those with the title "assistant head for finance/operations" saw their median compensation rise 34 percent between the 2011-2012 and 2015-2016 school years. Chief operating officers enjoyed a 31 percent pay hike in that time. For chief financial officers, median pay rose 22 percent.

OTHER RESOURCES

Deerfield Associates
deerfieldassociates.com

Ed Tech Recruiting
edtechrecruiting.com

Independent Thinking
independent-thinking.com

Grant Thornton Financial Executive Compensation Survey 2015
go.nboa.org/2eYgplb

2016 National Profile of Higher Education Chief Business Officers
go.nboa.org/2eay7jM

THE NEW GUARD



ANN-MARIE FLYNN

Shore Country Day School
(Beverly, Massachusetts)

Job title and start: Director of finance and operations, July 2016

Previously: Positions in financial aid, admissions and student employment at a private college; also accounting and management in food service, building management and transportation companies.

Surprised by: "Each day is a new and exciting challenge."

Advice for schools anticipating a leadership change: "Help cultivate a relationship between the current leader and successor. Have the current leader thinking about the transition a year in advance if possible, and make notes on cyclical forms and spreadsheets. Provide quick and easy access to a staffing directory with names and faces. A calendar of events and who 'owns' those events is helpful to compare past with present and helps to ensure nothing falls through the cracks. Only new items need to be updated for the current year."



THE NEW GUARD



JEFF CATALDO

Kent School (Kent, Connecticut)

Job title and start: Business manager and chief financial officer, 2012 (controller 2008-2012)

Attraction factor: "I was managing acquisitions for a large multinational company and was interested in being part of a smaller organization. My first reaction: why would I work for a not-for-profit when my entire career has been about maximizing profit? There was something about working for a school that I found interesting. I learned quickly that the world of independent school finance is fascinating and requires many of the skills learned in the for-profit setting."

Surprised by: "How broad the responsibility of an independent school CFO is."

Advice for schools anticipating a leadership change: "Do not lose sight of the school's mission. Remove the noise and confusion that exist in every organization, and focus on priority issues that will create value through program involvement. Independent school CFOs must realize that they are part of the operating team responsible for executing the strategy to improve the school; they must go beyond the management of traditional financial issues and remain committed to creating 'real value' for the school."

THE NEW GUARD



VIRGINIA ARBOUR

Emma Willard School (Troy, New York)

Job title and start: Chief financial officer, August 2016

Previously: 35 years in administration and finance, primarily in nonprofit hospice and palliative care organizations.

Attraction factor: "Having worked as a trustee of a college, I had become increasingly interested in education, especially advancement of young women. I wanted to be a part of empowering young women to be the great leaders of the future."

Surprised by: "The overlap between health care and education, with both sectors aligning risk with strategy in order to accomplish the mission."

Advice for schools anticipating a leadership change: "Look for leaders with good skills in communication, collaboration and ability to manage change. A good sense of humor wouldn't hurt. Leaders of the future need to be able to embrace and lead in change management while respecting the past, the culture and organizational strengths. Properly train, document and coordinate good succession planning for key roles."

THE NEW GUARD



JOHN CUNNINGHAM

St. Martin's Episcopal School (Atlanta)

Job title and start: Director of finance and operations, June 2014

Previously: Financial officer at a liberal arts college.

Attraction factor: "My children attended St. Martin's and I was previously a member of the board of trustees. The position intrigued me. I liked the school's mission and employees. I thought this could be a place where I could grow professionally and utilize my prior experience to benefit the school."

Surprised by: "The intensity and scope of the position. It requires skills that are both deep and wide."

Advice for schools anticipating a leadership change: "Plan ahead and look for a person who has the skills and ability to fit into the school's culture."

MEDIAN SALARY INCREASES FOR OPERATIONAL LEADERS, FY 2011/12-2016/17



Assistant head for finance/operations:

34%



Chief financial officer:

22%



Chief operating officer:

31%



Business manager/director:

21%



Director of finance and operations:

12%

Source: NBOA 2016-2017 Business Office Compensation and Staffing Survey Report
Download the report at go.nboa.org/Comp-and-Staffing, and see the article on page 10 of this magazine.

MEDIAN SALARIES OF CHIEF BUSINESS OFFICER FUNCTION BY REGION

East (N.Y. and N.J.)	\$185,400	Southeast	\$127,746
Mid-Atlantic	\$131,552	Southwest	\$125,000
Midwest	\$117,000	West	\$164,705
New England	\$170,613		

Source: NBOA 2016-2017 Business Office Compensation and Staffing Survey Report

These sharp escalations also reflect trends in the for-profit world. A 2015 survey from the Financial Executives Research Foundation reported that pay increases for corporate CFOs outpaced the 3 percent average for the entire business marketplace by about 1 to 1.5 percent. Overall, CFOs' salaries averaged \$284,924 at public companies and \$202,692 at private companies.

While most independent schools would be hard-pressed to match these salaries, they do have other advantages working for them. "I don't think education will ever be able to fully compete with industry pay at that level," said consultant Howard Teibel. But that may be immaterial. "People who do this kind of work do it because it's a calling," he said. "Independent schools need to do a better job of recruiting senior finance administrators who are committed to education, not to their discipline."

Others agree. "Nonprofit and for-profit incentives for key employees are different," said Philip Cork, assistant headmaster for finance and assistant treasurer at St. Andrew's School. "Understanding motivation is key to recruiting and retaining the right talent."

Identify these motivations and sell your benefits, said Shields. "There are certain aspects of quality of life that come with this position that many individuals may find rewarding, especially after a successful career in for-profit, government, auditing, etc." In addition, the work is just plain interesting. "If you like a fast-paced environment, if you like doing a lot of different things, if you like

solving problems, if you like serving a mission, then it's a really attractive field."

Jane Armstrong, managing partner of Independent Thinking, has placed several CFO candidates from outside the educational sphere seeking a new challenge. "When someone contemplates making a move into the independent school world, they are often at a point in their career when they can afford to take a step back in terms of compensation." And don't underestimate the appeal of joining a mission-driven organization. "The idea of waking up each day and working for the mission of educating future leaders of the country is really compelling. Feeling good about your work is a driving force."

In fact, not only is compensation typically not top-of-mind for aspiring independent school leaders — but it's sometimes the fifth or sixth topic discussed, according to Cooney. "It's all about the match, both for the organization and the individual. That means affinity interests, strengths, work-life balance, location, culture, and of course, salary. It's the whole package." Once you've identified the candidate of choice, however, "salary then moves to the top of the list of importance." **N**



Donna Davis is a freelance writer in Boulder, Colorado. **Stacey Freed** is a freelance writer in Pittsford, New York. **Leah Thayer** is editor of Net Assets and NBOA's vice president, communications.

THE NEW GUARD



JUSTIN WHEELER

Delaware Valley Friends School
(Paoli, Pennsylvania)

Job title and start: Chief financial officer, March 2016

Previously: Nine years as a CFO in the charter school sector. Taught English at two independent schools.

Attraction factor: "The Quaker belief system and how it plays out in education. I was interested in a school serving students with learning differences in a robust way. I was looking to return to working in a single school, close to program."

Surprised by: "I expected that the pace of organizational change would be slower than in the charter school sector. In fact, we've made significant changes at DV. We're in a very competitive and dynamic market, so we've got to be collecting quality data, doing quality analytics on that data, and constantly responding to what we learn. I'd go further and say that we need to generate more opportunities to learn about our market by piloting innovations and rigorously evaluating their results. I'm excited to be working with a head of school and leadership team that share that approach."

Advice for schools anticipating a leadership change: "There are benefits to bringing in school business leaders with experience in strategic roles in other sectors. There are also of course risks — especially that there won't be a culture fit. The charter sector grows up leaders more quickly than independent schools and, at least among the larger networks, benefits from the influence of business thinking from the tech, management consulting and finance worlds. It may be an emerging source of business and operations talent for independent schools."