

## Welcome to the Jungle NBOA

### Foreword *by Grant Lichtman*

The morning after NBOA president Jeff Shields asked if I would write the foreword to this new book, I sat down to look over the draft chapters. I had two immediate reactions. The first was, “Wow, look at the web of stuff that business officers are responsible for!” When you put it all down on paper, we see that schools are tackling a breadth of financial and business challenges that just did not exist 15 years ago. What used to be a traditional office with a staff accountant and a few spreadsheets has now grown to be big business for schools of all sizes.

The second was, “Shoot, where the heck was this book when I took over as a neophyte business officer at a large K-12 school in 1999?” The collective wisdom I was able to access back then consisted of what my predecessor left behind and the internal knowledge base of the school office staff. Thank goodness we have organizations like NBOA to help us leverage our collective experience and wisdom, much of which you will find in these pages.

The world is changing at a remarkable rate. By some estimates the sum of human knowledge will *double* every year by 2020. That is a staggering fact, particularly for schools, because we are in the knowledge business. Schools have only recently started to recognize this; we are in the early phases of what will likely be the largest shift in school-based education in at least 150 years. With massively greater global connectivity through rapidly evolving technologies, the very definition of what a school “is” and “does” is in the early stages of what many feel will be a transformational mutation in the next decade.

How does this affect the work of the business officer? From the first day I started running the finance and operations of an independent school I had one mantra: *the administrative staff is here to allow the teachers to do what they do best*. School exists for the kids, and everything else revolves around that. If we have the talent and patience to take care of the nuts and bolts so the teachers can just focus on the kids...well, it is a privilege.

That privilege now is a four-dimensional construct: a solid base of foundational practices that ensure institutional sustainability; a growing scaffold of vision-driven programs around which we construct a learning experience that will transform the lives of our young charges; and the fourth dimension of time, the institutional ability to evolve our school organizations at a rate commensurate with the external challenges and opportunities that this rapidly evolving world throws at us. And here is the key: the

school business officer, whether he or she is a CFO, Associate Head, or Chief Accountant, must now have his or her hand and head right at the center of it all.

Imagine four interlocking puzzle pieces: Changing World, Evolving Learning Practices, Innovation Strategies, and Financial Constraints. Schools need to pull these pieces together, in real time, or they risk irrelevancy in an increasingly competitive marketplace of educational options. The school business officer is absolutely key to completing this puzzle. Successful business officers are going to get out of the office and spend more time around campus; understand changing pedagogy and classroom practices; help align the use of time and space to impact and drive value. They will become increasingly familiar with, and leaders of, those time-tested strategies of organizational change and innovation that have proven critical to the success of knowledge-based industries since at least the Renaissance, 500 years ago. They will help to translate those innovation best practices into a language that our faculties, staffs, students, parents, and the broader community can understand. They will increasingly focus on enhancing the value that their schools offer to an increasingly discriminating and knowledgeable customer base, as opposed to keeping the lights on, the budget balanced, and the buses running on time.

This is not our mother and father's school business office; you are an organizational leader of value-based strategic thinking who must parlay those perspectives into sustainable financial and operating systems that govern the school. And, as I noted earlier, none of this works without a solid foundation, which is why this book is so valuable. This is a reference book, but one filled with templates, narratives, and examples for you to borrow, steal, and tweak. It holds the wisdom of true experts with decades of experience of what does and does not work.

Sometime in late 2003 or early 2004, I was at my desk working on financial aid awards and budget spreadsheets, or finalizing building plans with the campus architect, or deciding some existential argument about whether we should or should not offer peanut butter sandwiches in the cafeteria, when my phone rang. It was an ex-student of mine. He was calling from a basement bunker in the Green Zone of Baghdad. A 23-year-old civilian tasked with helping to distribute fuel and food, he had taken my high school seminar in strategic and creational thinking, where we learned that questions are more important than answers and that solving the right problem is predicate to creating good, systems-driven solutions in complex settings. First, he told me that it was the early hours of the morning in Baghdad and that the loud sounds I might hear were mortar shells coming in over the Zone walls. Then he told me that he wished I would hurry up and write a book about the seminar because Iraq was about as messy and complicated as it gets and he kept wishing there was something he could turn to and grab off the shelf when he needed a guide or reminder of how to approach a tough problem.

When an ex-student is being shelled and asks you to do something, you do it; I wrote the book.

Thankfully, independent schools in America are not being shelled, but we are facing significant challenges that lead to increased complexity in our financial and operational outlooks. Dealing with those effectively, not necessarily just as we did last year, but using the industry-wide base of knowledge and experience as a guide, is the business officer's task. Now you have a book on your virtual shelf to help.

*Grant Lichtman is Senior Fellow of The Martin Institute for Teaching Excellence, a growing national organization focused on transforming education through professional development for teachers and administrators. For almost 15 years, Grant has been involved in education as a trustee, chief of finance and operations, teacher, parent, and volunteer at Francis Parker School in San Diego, one of the largest independent schools in the United States. Over a decade and a half of remarkable transformation at the school, Grant was either directly responsible for, or intimately involved in, strategic planning, program design, campus planning and redevelopment, global education, advancement, marketing, educational technology, admissions and financial aid, benchmarking and trend analyses, and risk management. During his tenure, Parker won the NAIS annual award for Financial Sustainability. Grant is the author of "The Falconer: What We Wish We Had Learned in School" based on his seminar in strategic and creational thinking. In 2012, he completed a 10,000-mile trip around the country visiting 64 schools to learn about how they are innovating to meet the needs of the 21<sup>st</sup> Century. He facilitates workshops with both private and public schools and school groups based on his research, and is writing a book on his findings.*

*Before working in education, Grant directed business ventures in the oil and gas industry in the former Soviet Union, South America, and the U.S. Gulf Coast. Grant graduated from Stanford University with a BS and MS in geology in 1980 and studied the deep ocean basins of the Atlantic and Pacific Oceans and the Bering Sea. Grant and his wife, Julie, live in Poway, 20 miles north of downtown San Diego. Their son, Josh, is a PhD candidate in systems biology at Stanford. Their daughter, Cassidy, graduated with her BA in Political Science and MA in History from Stanford, and is currently a professional volleyball player and member of the USA National volleyball team.*