

2.9 Becoming a Strategic Partner

By Kareen Laplanche

As a Chief Financial Officer (CFO), Business Manager or Finance Manager, whatever your title, if your role oversees the business and operations aspects of your school, you are expected to be or become a Strategic Partner to your Head of School (HOS). This is where the future of the profession is headed based on a NBOA 2015 NBOA article by Jeff Shields.

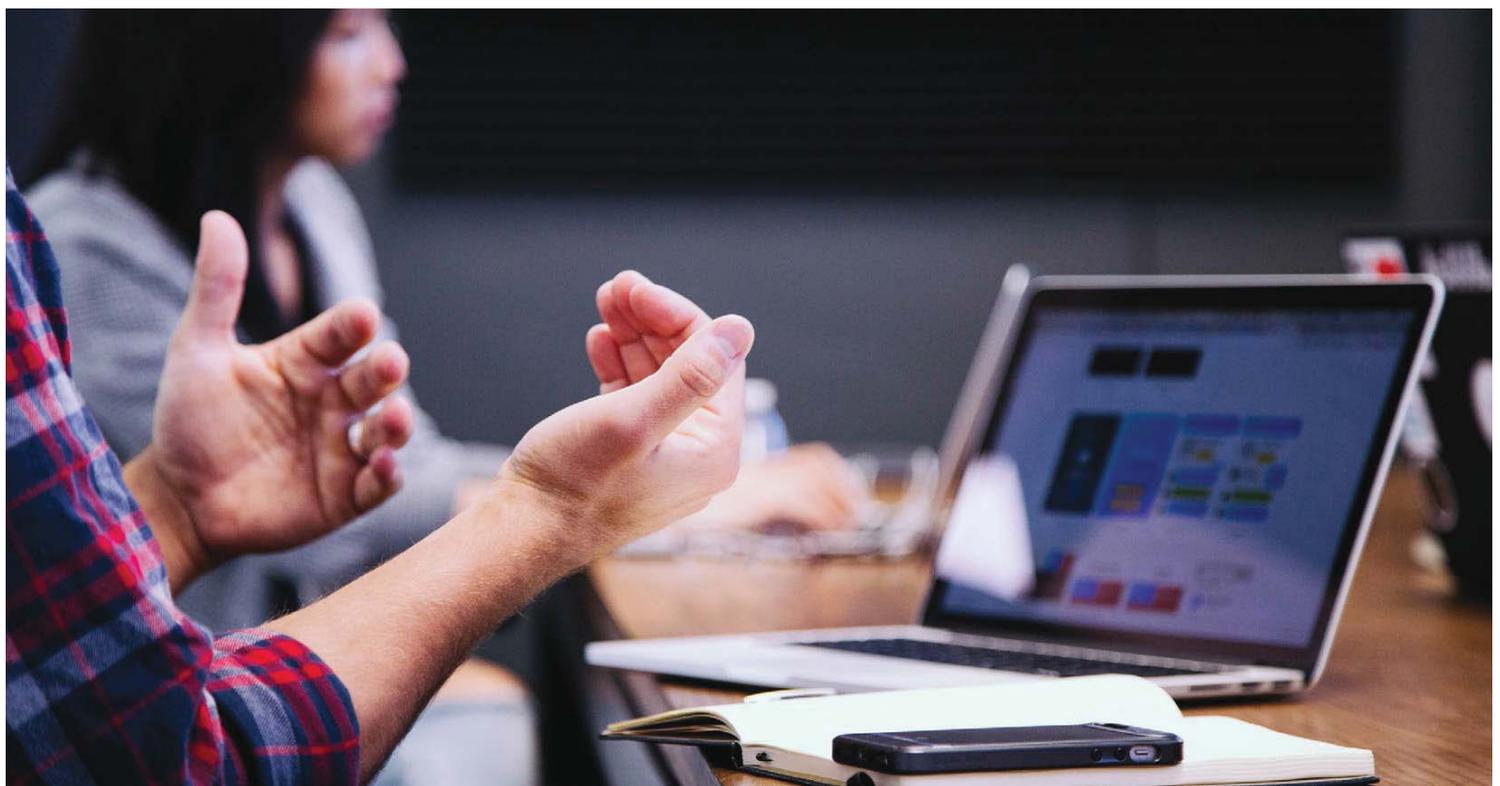
In this field, over the past decade the responsibilities of the business office leaders have increased. We are called to support the HOS not only in the execution but as well in the thinking and planning of financial and non-financial aspects of the school.

My name is Kareen Laplanche and I am the Finance Manager at the American School of Kinshasa (TASOK). My title does not say all that I do but my role goes beyond the tasks of the business office as I am called to support the HOS. I have been through major changes in the school leadership in the past 10 years. I have learned to adapt and transform challenges into opportunities to grow and becoming a Strategic Partner.

In my early years a Business Officer (2010), I was asked to step in as interim Business Manager in a critical moment for the school. Five months later I was offered

the permanent position because the head and I joined our efforts and the transition that was seamless. I learned to quickly rise above the challenge of leading the entire business office team, of implementing control systems to keep operations running. I worked 5 years with the head in executing the first phase of our master plan, in dealing with board changes and staffing issues, enrolment decline and elections-related political uncertainties. Later, in 2015, the school welcomed a new head with new vision, ideas and style. From 2015 to 2019, the new HOS and I worked on financial and operating aspects to support re-accreditations, verification visits, implementation of new programs, preparation to cope with political instability, mitigation of physical plant challenges, community crises etc...

To summarize, the key word in all this experience is Strategic Partnership between the Head of School and the Business Office Leader, in TASOK's case (my case), the Finance Manager. In this article I will focus on only four aspects of what this partnership looks like.



A place to build your own road to success



An International University in Spain
Segovia & Madrid

www.ie.edu/university

A Strategic Partner is a good communicator

I've learned to be prepared to communicate at all times whether things are good, bad or ugly. It is a two-way process. The good communicator is also a good listener. Be willing to give advice or share a piece of wisdom from experience or making connections with the past. There should be no surprise nor secrets kept from your head of school.

As years pass, I slowly but surely became a historical reference. Staff change, situations happen, people move on and also forget. I keep records of important things that may come up later during an audit or strategic planning session with the head and other leaders.

A Strategic Partner knows his/her business

It is important to know your data and communicate it well to business as well as non-business people. Having timely and useful information on hand is key.

I have worked with my team to have the routine reports ready for meetings with the HOS, the Finance

Committee and the Board. However, I keep track of other data and facts that come into play during strategic planning discussions. These include but are not limited to looking at the past trends (enrolment and tuition increase history, accounts delinquency history, operating expenses, projects funding), comparing key data with other schools, anticipating budget pitfalls....

In the area of compliance, it is important to stay up-to-date in an ever-changing local tax and labour framework. In addition to relying on the human resources person on staff, I also seek expert counsel from outside contractors such as accounting firms, lawyers and auditors. It is important to stay up-to-date and out of trouble.

In the area of financial investment, a constant communication with portfolio managers is mandatory. However, continuing to educate myself in this area is necessary as well. I must understand what I am seeing/hearing to be able to explain it back so it makes sense for everyone.

continue →

A Strategic Partner builds an efficient team

It is important to train and elevate staff by focusing on strengths and working around weaknesses. The work is not done alone. It needs the coordination of an efficient team. I oversee a team of seven (7), not counting cross-over staff from administration, maintenance and projects. I rely on my team for data entry, accounting and reporting, compliance to labour and tax regulations, inventory management.

Continuing education is necessary to stay up-to-date with what is going on with the field. This can be done through online and face-to-face professional development, peer-to-peer exchange and/or mentorship, conference participation, etc... The professional development should benefit the entire team.

I usually target areas of weaknesses and look for non-costly ways of making the training available. For example, we hold a weekly meeting that includes a professional development component. I collect resources from many sources and deliver to the staff over a period of time. Some of my team members have attended local and regional workshops in their area of expertise: accounting, human resources and administration executive. We are improving this practice by planning ahead, setting budget aside and setting a schedule.

A Strategic Partner is mission-oriented and vision-driven

Our vision and mission were revamped recently to reflect better our community. It was a school-wide

experience and all should take ownership. I remind my staff on regular basis to make sure we live up to the expectations of Excellence, Integrity and Inclusivity.

As their leader I need to set this example inside and outside of the business office. This should transcend in my interactions with students, parents, staff and well as with the board. Unity in language and actions is important.

As a Strategic Partner I work with the HOS for the good of the whole. It's not about me, it's about the community. I work in the background to make sure we deliver according to the mission/vision of the school, whether we plan for a fundraiser, revisit the budget, or face a difficult decision, it comes down to being true to our mission and vision.

In conclusion, there are a lot of opportunities for today's Business Officers to position themselves as Strategic Partners. My advice is that they should pursue that goal. We will explore more on this topic at the upcoming Business Institute at AISA 50th anniversary conference in November 2019: "The Evolving Role of the Business Officer", a two-day workshop.

Note of Thanks

I want to thank deeply the two Heads of School I had the privilege to work with at the American School of Kinshasa: Irene Epp (2007-2015) and Simon Gillespie (2015-2019). I have learned a lot from both. I continue to cherish the moments of laughter, stress, deep thinking and joy we shared over the years we served our great school together.

About the Author

Kareen is the Finance Manager at The American School of Kinshasa (TASOK) in the D.R. Congo. She has a combined education/training in architecture, planning and business management which allows her to fit easily into an interdisciplinary environment. Prior to joining TASOK in 2008, she worked for the United Nations, private and public institutions in Haiti and in the United States. Through this exposure to international and multi-cultural environments, she learned to develop strong leadership and communication skills that are essential to her role as a senior manager.



Kareen Laplanche