

The Important Role of the Chief Financial Officer as a Strategic Partner in the School's Successful Future

The Chief Financial Officer is an integral part of a school's leadership team and one of the most important strategic partners in decision-making. The CFO brings a different skill set to the organization and can be an invaluable partner in providing colleagues with a different and often dynamic perspective. This session will focus on the role of the CFO in strategic planning, in enrollment management, and in the advancement areas of the school, including capital campaign planning.

Learning Objectives:

Participants will learn the role of the CFO in strategic planning, in enrollment management, and in the advancement areas of the school.

Presenter: Kathleen Hanson, Senior Consultant and Principal, Marts & Lundy

Kathleen Hanson, a former Independent School Advancement professional, joined the firm of Marts and Lundy in 2010 as a Senior Consultant and Principal and leader of the Schools Practice Group.

Most recently, Kathy served a 10-year tenure as Vice President for Advancement and Planning at the Baylor School in Chattanooga, TN. Baylor is a day-boarding school of 1200 students in grades 6 through 12. Prior to Baylor, Kathy was Vice President for Advancement at The Fessenden School in Boston, MA, and the Director of Institution Advancement at Kent Place School in Summit, NJ.

Kathy is a former member of the Board of Directors of The Association of Boarding Schools and also a former member of the CASE Board of Trustees as well as a six-year term Board member with the Enrollment Management Association.

Kathy and colleague Jeff Wack developed the Marketing Institute for Independent Schools, which is in its 20th year, and has served over 1000 independent school professionals. In addition, Kathy served as Editor of the NAIS Marketing Handbook, which was released in February 2013.

Kathy's current client base includes independent schools across the country, where she serves as counsel in all areas of advancement as well as strategic planning.

Kathy and husband, Dale, reside in Chattanooga, TN.

Field of Study: Management Services

Prerequisites: Basic knowledge of independent school finances

Advanced Preparation: None

Program Level: Update

Delivery Method: Group Live

Participants will earn 1 CPE credit.