



Reimagining the Business Office – A Strategic Imperative and Untapped Asset

1. Start with a Strategic Vision

- Reflect: Does the Business Office align with the school's mission and strategic priorities?
- Action: Identify three ways the office could move from transactional to transformational operations.
 - i. _____
 - ii. _____
 - iii. _____

2. Foster a Culture of Collaboration

- Question: How can the Business Office become a partner for faculty, parents, and donors?
- Action: Create one new initiative (e.g., a shared budgeting workshop, impact wishlist, or storytelling project) to engage stakeholders actively.
 - i. _____

3. Audit for Untapped Potential

- Reflect: What outdated processes could be optimized?
- Action: Review contracts and systems to identify savings or process improvements (e.g., renegotiate with vendors. automate routine tasks).
 - i. _____

4. Enhance Financial Transparency and Trust

- Ask: Are financial reports providing clarity and building trust?
- Action: Using visual data and narratives, redesign reports to showcase how resources directly impact mission outcomes.
 - i. _____

5. Embrace Technology Thoughtfully

- Consider: What technology solutions could reduce friction and improve efficiency?
- Action: Identify one process to digitize or streamline (e.g., online payment options, cloud-based accounting, digitizing files).
 - i. _____

6. Build Leadership Dynamics

- Reframe: Think of the CFO as the Executive Chef and the Controller as the Sous Chef—each vital to the overall "meal."
- Action: Clarify leadership roles and align team responsibilities for strategic and tactical balance.

i. _____

7. Reimagine Community Connections

- Question: Is the Business Office seen as an accessible partner or a behind-the-scenes function?
- Action: Identify one way to create a welcoming atmosphere, such as working in the dining hall one afternoon a week or attending faculty meetings.

i. _____

8. Leverage Data for Decision-Making

- Reflect: Are decisions informed by real-time, actionable data?
- Action: Create a decision matrix to weigh trust and impact when evaluating new initiatives or budget allocations.

+		
-		
	-	+

9. Cultivate Resilience Through Change

- Consider: How can the Business Office lead change without disruption?
- Action: To build momentum and confidence, start with small, visible wins (e.g., automating a simple process or solving a common staff pain point).

i. _____

10. Measure and Celebrate Success

- Ask: What metrics truly matter for our office and community?
- Action: Identify one new metric to track (e.g., time saved, satisfaction rates, or donor engagement) and celebrate progress with your team.

i. _____

