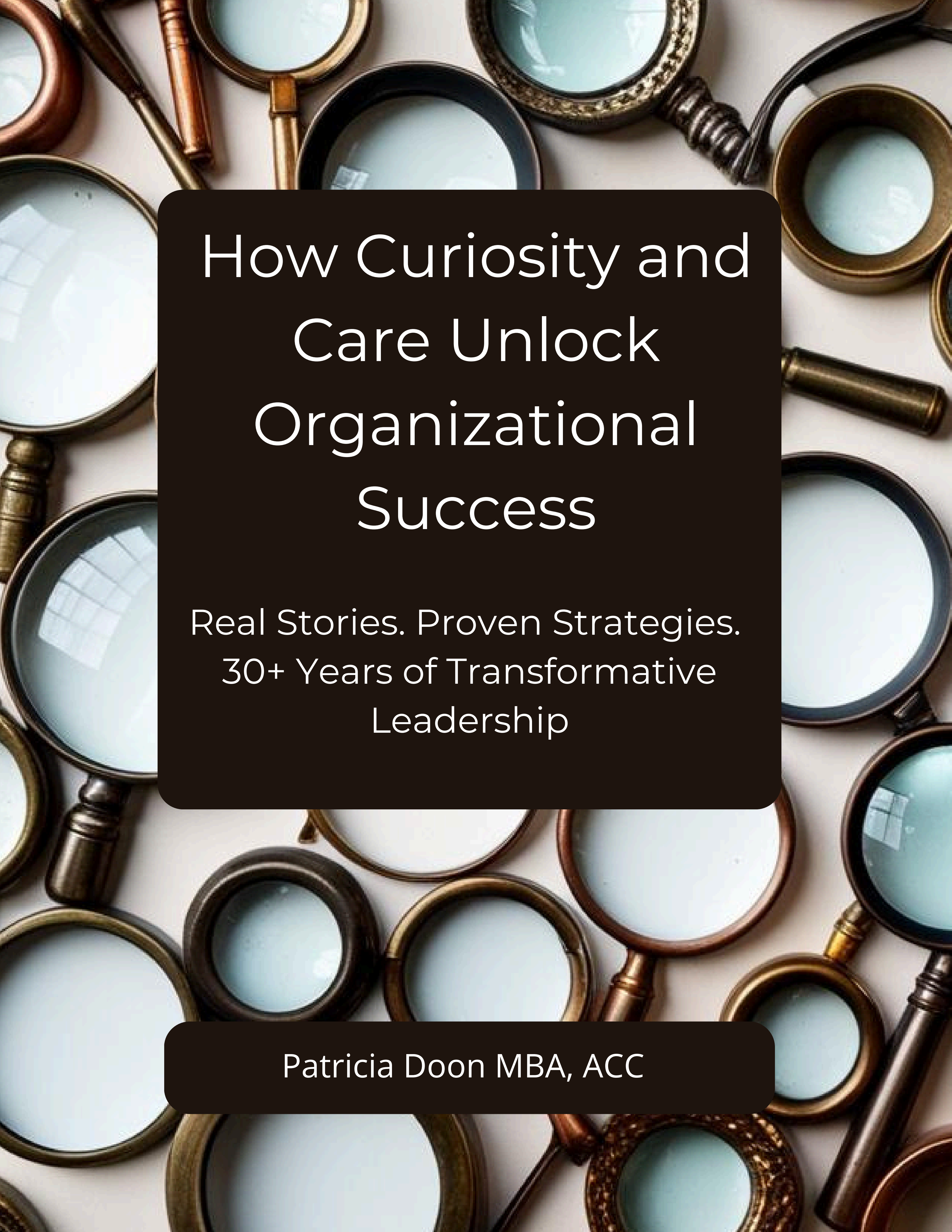

How Curiosity and Care Unlock Organizational Success

Real Stories. Proven Strategies. 30+ Years of Transformative Leadership

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Author's Note

I wrote this book to showcase the power of curiosity and care in financial leadership. As a CFO, I've seen how strategic partnership—not just transactional management—can transform organizations. This isn't about balancing the books or crunching numbers; it's about uncovering opportunities, solving puzzles, and creating pathways to long-term success.

CFOs are problem solvers, innovators, and catalysts for growth. We connect the dots, provide clarity, and build systems that empower organizations to thrive. A good CFO amplifies impact, ensuring resources are used wisely and sustainably while driving meaningful change.

This book is a collection of stories, insights, and tools drawn from my experiences helping organizations navigate challenges and embrace opportunities. My goal is to inspire you to think differently about financial leadership and see how it can create measurable, lasting value.

Thank you for being part of this journey. Together, let's paint it done.

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The Curious CFO—Curiosity and Care in Action

In the world of finance, numbers tell a story. But sometimes, the most telling stories are the ones hidden between the lines, waiting for someone to ask the right questions. That's where I come in. As an Interim CFO, I don't just balance books or crunch numbers—I solve mysteries.

Each day presents a new puzzle, challenge, or opportunity to uncover inefficiencies, lost potential, or even hidden assets. And it's not just about fixing what's broken; it's about asking, *What is the current state? How well is it working? What is the ideal?* Curiosity, coupled with a deep sense of care for the organizations I work with, drives me to look beyond the surface and discover what's happening within the systems and structures.

Throughout this book, you'll also find the **Paint It Done Checklist** at the end of each chapter—a practical tool designed to guide you through actionable steps. This checklist reflects my **Discover, Envision, and Create methodology**, which transforms financial challenges into opportunities for measurable impact. Whether you're evaluating systems, building a team, or navigating strategic priorities, the checklist ensures every insight leads to concrete outcomes.

This book is a collection of those discoveries—stories from my career that showcase how a CFO is more than a numbers person. These are the mysteries I've encountered in the nonprofit and corporate worlds, where every decision, no matter how small, has the potential to shape an organization's future. From uncovering hidden costs to discovering untapped opportunities, these cases reveal the real impact of curiosity and care in financial leadership.

Each chapter provides a glimpse into the challenges and complexities of managing finances and the immense potential of uncovering the hidden stories within the numbers. You'll see how small inefficiencies can amass into costly issues, how building a strong team elevates the whole operation, and how taking calculated risks can lead to long-term growth.

These stories aren't about me. They're about the organizations I've worked with—their goals, struggles, and journeys toward sustainability and success. Through their stories, I hope to show you how asking the right questions can make a difference and how every organization, no matter its size or scope, has the potential to evolve and thrive.

Welcome to The Curious CFO. Let's solve some mysteries together.

Part 1: Foundations of Success

Every strong organization is built on solid foundations. For CFOs, this means starting with the basics: understanding where inefficiencies hide, uncovering operational gaps, and addressing overlooked costs. This section tackles the essential systems and practices that must be examined before moving forward. These are the foundational mysteries every CFO must solve to create a stable and effective organization.

Chapter 1: When Systems Outlive Their Purpose—What Happens Next

It had been there for as long as anyone could remember—an old, familiar system, quietly doing its job in the background. Reports were slow, data was incomplete, and strange redundancies popped up occasionally, but no one questioned it. Why would they? The system worked good enough… well, sort of.

The cracks became impossible to ignore as key people retired or moved on. Client records were entered, but there had been very little maintenance over the years, resulting in some clients being set up twice and others with conflicting details. Reports took longer to generate, and when they finally did, the information was confusing and inconsistent. Frustration grew, but no one understood the underlying system to determine why it was happening.

That's when I was brought in. As a CFO, my job is to ask questions that can reveal hidden issues. This situation called for one critical question that hadn't been asked: *How does this system support our ability to manage information and make decisions?*

I started by asking the basics: *"What is happening? What is this system supposed to do? Why are we using this system? What purpose is it fulfilling?"*

The organization used the same student information and payroll systems for nearly twenty years. Industry standards supported both systems, but the organization had not kept up with updates or improvements. The systems were still running in their original form, and nobody had questioned whether they were still meeting the organization's evolving needs.

As I examined the student information system more closely, more issues emerged. There were duplicate client entries, inconsistent data formats, and gaps in vital information—it was impossible to pull meaningful reports without making significant edits. I asked, "Why is the same client set up twice in two different ways?" The response: "Oh yeah, that happens sometimes."

No one had become curious enough. And that was the real issue—not the system itself, but the lack of curiosity. The systems had been running on autopilot for years, and the relevance or effectiveness had not been questioned.

The systems were not only outdated but also operating without purpose. It was never asked if the systems continued to align with the organization's needs. Why hadn't they been updated? Why hadn't anyone explored the vendors' newer features? The student information, payroll, and accounting systems were frozen in time because no one had been curious enough to ask if they still worked.

Without curiosity and care, inefficiencies went unnoticed, and essential updates were deferred. While the vendors had made improvements, few of them had been adopted. And since it was no single person's responsibility, there had been no push to dig deeper and ask a few questions.

But here's the thing: I found those weren't the only hidden inefficiencies. As I probed into the organization's operations, I uncovered a pattern extending far beyond the systems themselves—silently draining resources and holding the organization back.

These inefficiencies revealed a more extensive pattern—a call for the organization to rethink its approach to systems and operations. By addressing these hidden gaps with curiosity and care, they could unlock new potential and better align their processes with their mission.

Key Ideas:

1. **Systems Reflect Their Management**: Outdated systems are often a symptom of neglected oversight and a lack of formal operational hygiene processes.
2. **Curiosity Drives Improvement**: Asking critical questions can quickly uncover inefficiencies and hidden problems.
3. **Autopilot is Risky**: Running systems without regular evaluation can lead to wasted resources and missed opportunities. **Everything needs to be managed**.
4. **Alignment is Key**: Systems need to evolve alongside organizational goals and needs.
5. **Care Fuels Change**: Genuine care for operational effectiveness inspires action.

Paint it Done Checklist:

Discover:

- Evaluate existing systems: How long have they been in use? Are they meeting our needs today and in the future we can see?
- Review system performance: Are there redundancies or inconsistencies within systems and between systems?
- Ask: What are the current challenges caused by this system?

Envision:

- Define the ideal functionality: What should the system achieve?
- Identify features or updates offered by vendors that align with current needs.
- Imagine how improved systems could enhance decision-making, efficiency, and overall experience.

Create:

- Develop a timeline for updates or system replacements.
- Communicate with vendors to explore options and costs.
- Implement one improvement and track its impact on operations.

By questioning the status quo and aligning systems with organizational goals, you'll unlock hidden efficiencies and set the stage for long-term success.

Chapter 2: Breaking Free from Inefficiency—Finding What Was Missing

As I wrapped up my investigation into the old systems, I thought I'd uncovered the heart of the problem: outdated systems no longer served their purpose and operated without anyone asking the right questions. But the deeper I looked, the more I realized those systems were only part of the story.

Something else was happening—not just about technology or processes. There was a hidden drain on resources, quietly holding the organization back in ways no one had anticipated.

It started innocently enough. I noticed something strange during a meeting with department heads to discuss how the systems were being used. Each department was working with its own version of the truth. Numbers didn't match up across teams, processes were inconsistent, and employees spent an enormous amount of time gathering data each time they created a report.

I asked a simple question: *"Why are these processes taking so long?"*

The answer: *"It's just how we've always done it."*

That phrase was a red flag. It meant no one questioned whether there was a better, more efficient way to work.

The inefficiency wasn't just in the systems but in the habits and workflows that had developed over time. Departments weren't working together; they were operating in silos, each with their own way of managing data and often duplicating efforts. Worse, the systems they relied on weren't designed to communicate with one another. The accounting team's numbers didn't match the reports pulled from the student information system, and the admissions department had a data set that didn't align with either.

Everything had to be manually reconciled, and it was costing the organization valuable time—and money.

As I dug further, a clear pattern emerged. People had adapted to inefficiencies rather than solve them. The staff had become accustomed to making things work, even if it meant spending hours on tasks that should have taken minutes. The organization was relying on workarounds rather than investing in solutions.

I realized that the true culprit wasn't just a missing system update—it was missing efficiency.

The questions had never been asked, so no one knew how much time and money was wasted because they had become so used to the inefficiency. Over time, the organization had learned to live with slow processes, extra steps, and duplication of efforts. The inefficiencies were so ingrained that they were invisible.

I asked: *“What if there were a way to streamline all of this? What if you didn’t have to extract data for every report or manually correct each report?”*

The idea of efficiency was immediately met with a response: That’s too expensive. It had not occurred to anyone that it was already too expensive and that things could be done differently.

The solution didn’t come from just updating the systems—it came from changing how people thought about their work. By centralizing data, reducing silos, and ensuring that systems communicated with each other, we were able to regain hours for more productive work. Which makes everyone’s life better. Departments no longer worked in isolation, and reports were generated accurately for the first time, with no need for manual reconciliation.

Efficiency was catching on. Over time, with questions becoming a welcome part of working together, working smarter became part of the organization’s DNA.

These changes showed that efficiency isn’t just about technology but how you approach your work. Don’t settle for inefficiency just because it’s familiar. Question everything and find opportunities to improve user experiences in your organization.

Key Ideas:

1. **Inefficiency Hides in Habits**: Over time, inefficiencies can become so ingrained they go unnoticed.
2. **Silos Drain Resources**: Lack of collaboration and communication leads to wasted time and money.
3. **Behavior Matters**: Changing how people think about their work is just as important as upgrading technology.
4. **Workarounds Aren’t Solutions**: They perpetuate inefficiency, delay meaningful progress, and run the risk of a high error rate.
5. **Efficiency is Transformative**: When embraced, it can dramatically improve organizational outcomes and the experience of users and customers.

Paint it Done checklist:

Discover:

- Map current workflows: Where are the bottlenecks?
- Identify repetitive tasks and redundancies.
- Ask: Where are the manual processes, and how much time is spent on tasks that could be automated?

Envision:

- Imagine a streamlined process: What would ideal efficiency look like?
- Assess technology gaps: Are there tools or systems that could bridge gaps?
- Encourage collaboration: What processes could be unified across departments?

Create:

- Implement cross-departmental training on system use.
- Challenge culture where curiosity and questions are welcome.
- Pilot one improvement to measure impact on efficiency.
- Develop a long-term plan for continuous process evaluation.

By fostering a culture of curiosity and collaboration, inefficiency can be eliminated, paving the way for sustainable success.

Chapter 3: Spotting the Invisible Drain—Reclaiming Hidden Costs

After streamlining inefficiencies and creating a more collaborative workflow, I thought we had addressed the organization's biggest challenges. However, I noticed something peculiar as we streamlined operations and centralized data. Buried deep in the financials, there was a cost that no one seemed to notice—a cost that had been quietly accumulating for years.

This was no ordinary oversight. It was something far more subtle. Something that had been hidden in plain sight.

It all started when I reviewed the organization's budget. The numbers were adding up, but something felt… off. I noticed a recurring expense for phones that deserved a second look. It appeared monthly, and no one seemed to manage it.

At first, it seemed usual and ordinary, but the amount felt too high, and my curiosity got the better of me. I decided to dig deeper.

I asked the accounting team, *"What exactly are we paying for? The cost has doubled, and no one seems to be managing it."*

They didn't have a clear answer. "Oh, it's for phones. We get charged monthly," one of them said. But when I pressed further, no one could give me a specific explanation for what phones and what services.

That's when I knew I had stumbled onto something bigger than just an overlooked line item. This wasn't just an error—it was something more insidious.

As I peeled back the layers, I discovered that the cost wasn't for phones. It resulted from legacy phone lines that had not been used for years and an unchecked autorenewal. The charges had been reasonable, but they had ballooned significantly over time.

For the last decade or more, the phone company had been quietly siphoning off resources simply because it was a routine vendor and had no budgetary oversight, no one questioned it. It had slipped through the cracks, buried in routine approvals and assumptions. No one bothered to investigate it because it wasn't alarming to pay the phone bill. But when I finally added it, it became clear that this cost had amounted to several hundred thousand dollars over the years.

I realized that this wasn't an isolated case. Other hidden costs were likely lurking in the budget—old subscriptions, outdated services, and expenses that no longer served the organization's mission yet were still being paid for without question.

The problem wasn't just the hidden cost itself—it was the mindset that allowed it to persist. There was no curiosity or questions about the details or whether the expense still served the organization's purpose. Thus, the cost continued to grow, draining resources that could have been better used elsewhere.

I knew we needed to change our approach to the budget. It wasn't enough to review the numbers at face value. We had to develop a habit of questioning every line item and expense. No more assumptions. Every cost needed a purpose and approval from a manager.

We conducted a full audit of all recurring expenses, with one goal: eliminate the costs that no longer served the organization. We canceled old contracts, dropped unnecessary services, and scrutinized automatic renewals.

By the time we were finished, we had freed up a substantial amount of money—resources that could be redirected to the organization's mission.

These findings underscored a critical lesson: hidden costs can quietly drain resources, but they can be uncovered and eliminated with a proactive approach. Regularly audit your budget to ensure that every expense serves a clear purpose, and you'll avoid the pitfalls of unnoticed costs.

Key Ideas:

1. **Hidden Costs Add Up**: Even small, unnoticed expenses can become significant financial drains.
2. **Automatic Renewals Require Oversight**: Subscriptions and recurring charges can persist long after their purpose has ended. Consider turning off annual auto-renewals and make renewals an act of opting in, not opting out.
3. **Details Matter**: A proactive, detail-oriented approach to budgeting can uncover inefficiencies.
4. **Assumptions Are Risky**: Never assume a cost is valid without verification.
5. **Budgets Reflect Priorities**: Align expenses with the organization's mission and goals.

Paint it Done checklist:

Discover:

- Review all recurring expenses: What services are being paid for?
- Cross-check budget categories for duplicated or unclear costs.
- Ask: Are these expenses still serving their intended purpose?

Envision:

- Imagine a budget free of unnecessary costs: How could the savings be reallocated?
- Identify tools or systems that provide visibility into recurring charges.
- Align every expense with organizational priorities.

Create:

- Conduct a thorough audit of all subscriptions, contracts, and recurring charges.
- Cancel outdated services and renegotiate necessary contracts.
- Implement a regular review process to prevent unnoticed costs from accumulating.

Systematically addressing hidden costs can reclaim valuable resources and ensure that every dollar works toward your organization's goals.

Part 2: Operational Excellence

Once the foundations are solid, the next step is refining and optimizing the organization's operations. This section focuses on the core practices that keep an organization running smoothly, from aligning stakeholder expectations to building high-functioning teams. Operational excellence isn't just about efficiency—it's about fostering trust, collaboration, and clarity across all levels of the organization.

Chapter 4: Navigating Stakeholder Expectations—Balancing Priorities with Precision

Stepping into a CFO role often means entering a storm of competing expectations. The board wants financial sustainability. The leadership team has big visions but no clear pathway to fund them. The staff just wants their department budgets intact. It's a balancing act, and it requires both diplomacy and precision.

One of my first challenges in a new role was a tense budget season. The board had set a goal of minimal increases—just 2% in primary revenue streams and 4% for staff salaries. While this might sound reasonable, it became clear that this approach was unsustainable when expenses were already at 90% of revenues. Increasing at this rate was bad business because it created an inherent structural imbalance. When your largest expense category—salaries—is growing faster than your best estimate of revenue growth, it sets the organization up for long-term financial strain. This mismatch between income and expenses squeezes resources, limits flexibility, and leaves little room for contingencies or strategic investments. Over time, it can erode reserves and force difficult trade-offs that could have been avoided with better planning.

I quickly realized this wasn't just a financial problem but a leadership problem. No one wanted to deliver the hard truths, and everyone wanted to be seen as the savior. Compounding this was the board stepping beyond its governance role and interfering in operations. While management was seasoned and fully capable of running day-to-day operations, the board's overreach created unnecessary complications, leading to headaches and heartache. My role became about addressing financial realities and re-establishing boundaries, ensuring the board focused on strategy and oversight while leaving operations to the management team.

First, we set up exploratory meetings with stakeholders with no predetermined outcomes. The goal was not to immediately drive toward a solution but to foster curiosity and ask questions that could reveal deeper insights. We encouraged participants to consider the broader context and to challenge assumptions. For example, instead of jumping to conclusions like 'we need to increase enrollment,' we asked questions such as: 'What levers do we have to manage expenses? What relationships influence our ability to grow revenue sustainably? What opportunities are we not seeing?' This approach created a culture of exploration and discovery, laying the groundwork for more informed and strategic decision-making. With the board, I clarified that maintaining these minimal revenue increases while accommodating salary increases would lead to a structural deficit. I highlighted the need for expense management and stronger revenue growth strategies to achieve financial stability. With the leadership team, I detailed the financial risks of their proposed expansions and encouraged phased investments tied to realistic revenue forecasts. With the staff, I worked to demystify the financial constraints and focused on empowering them to make cost-effective decisions that preserved the quality of their work. and empowered them to find creative solutions within their departments.

Through these conversations, I introduced a new framework for decision-making: every financial decision had to meet three criteria. It needed to (1) align with the organization's mission, (2) deliver measurable impact, and (3) be sustainable over time. This framework created a common language for evaluating priorities and ensured everyone worked toward the same goals.

Once the framework was in place, the conversation shifted from avoidance to strategic realism. Rather than debating which departments or initiatives should take priority, we focused on understanding that the pie size was fixed. It was a large pie, but it could only be sliced in so many ways. Our task was to allocate resources judiciously and strategically, ensuring that every slice maximized impact and aligned with the organization's mission. The leadership team restructured their proposals to phase investments over multiple years, aligning them with anticipated revenue growth. Department heads found innovative ways to reduce costs without compromising their programs.

By the end of the process, the organization had taken steps toward a more collaborative and strategic approach to financial planning. However, the structural deficit remained—a direct result of years of decisions prioritizing short-term ease over long-term stability. While progress was made, it was clear that deeper changes were still needed to ensure true financial health and sustainability.

Navigating stakeholder expectations taught me that a CFO's role goes beyond managing money. It's about managing relationships, building trust, and creating a culture of transparency and collaboration. When stakeholders feel heard and understand the rationale behind financial decisions, they're more likely to support the organization's goals—and each other.

Key Ideas:

1. **Alignment is Critical**: Ensure that all stakeholders work toward shared goals by creating a common framework for decision-making.
2. **Communication Builds Trust**: Open, transparent conversations help stakeholders understand financial realities and foster collaboration.
3. **Balance is an Art**: Balancing sustainability, growth, and stakeholder priorities requires strategic thinking and empathy.
4. **Empowerment Leads to Innovation**: When stakeholders understand constraints, they're more likely to find creative solutions.
5. **Clarity is Key**: Clear criteria for decision-making reduce conflict and build consensus.

Paint it Done checklist:

Discover:

- Identify key stakeholder groups and their expectations.
- Gather input on priorities, concerns, and goals.
- Review the financial context and constraints to understand what's possible.

Envision:

- Create a framework for decision-making that aligns with the organization's mission and goals.
- Develop clear criteria for evaluating priorities (e.g., impact, sustainability, alignment).
- Imagine a collaborative process where all stakeholders feel heard and involved.

Create:

- Facilitate open conversations to align expectations and build trust.
- Introduce the decision-making framework and apply it to evaluate priorities.
- Empower stakeholders to find creative solutions within constraints.
- Monitor progress and adjust the process as needed to ensure alignment.

By fostering transparency, collaboration, and alignment, you can confidently navigate stakeholder expectations and create a stronger, more unified organization.

Chapter 5: Communicating Financials Effectively—Turning Numbers into Stories

I quickly realized the financial picture was incomplete when I joined the organization. The chart of accounts, from which all financials were created, was weak and didn't tell the full story. Department expenses were lumped into individual buckets, so without a lot of analysis it was a challenging exercise to determine how much was being spent on subscriptions or internet or employee health insurance. The accounting manager, who had been in her role for 20 years, had been left to manage things her way without insight or oversight. As a result, the financials weren't structured to answer critical questions.

At my first board meeting, I encountered this gap firsthand. The board was engaged and asked insightful questions: *What's the cost of running each campus? How much revenue is generated at each located?* These were important questions—ones I couldn't answer because the books weren't designed to capture that level of detail.

I decided to dig deeper and asked the board what else they had been missing. Their responses painted a bigger picture of the challenges:

- *How much are we really spending on employee benefits?*
- *What are the true costs of running each program?*
- *How much should we set aside annually for facility maintenance?*

It became clear that the budget had never fully accounted for operational needs. Vendor payments were late, and paid on a cash basis, adding another layer of complexity for reliable financials. The organization had no structured way to analyze costs or plan for the future. These were fundamental issues—and surprisingly easy fixes—but they had gone unaddressed for years.

I knew this organization didn't just need better financials; they needed to understand the levers that made a difference. The first step was to update vendor payments, record them in the corresponding month and begin to convey strength in the operation. The next step was rebuilding the chart of accounts to ensure it aligned with the board's questions. Costs were restructured by location, and department, and account codes were added to track expenses across departments and locations. With these changes, we were moving towards financials that provided real answers. We still had an issue with comparables, since the accounting system dated back to 1995 with the previous account structure.

Updating the accounting structure was the beginning. I wanted to empower the board to see where we stood today and how decisions could shape the future. I introduced a multi-year budget model, a dynamic tool that allowed us to adjust a single variable and immediately see its impact on the bottom line. Whether we were increasing enrollment, changing benefit costs, or adjusting program expenses, this tool made it possible to connect decisions to outcomes in real-time.

Overhauling the system wasn't enough, but it was the impetus to see what was possible. I presented the updated financials alongside the new budget model at the next board meeting. The narrative and numbers were telling a story and the board engaged in ways they hadn't been able to before. For the first time, they were receiving information and answers with clarity and confidence. We could begin building pathways to long-term sustainability.

Communicating financials effectively isn't just about providing accurate numbers—it's about making those numbers meaningful. By addressing the gaps, building tools for strategic planning, and connecting financial data to decision-making, we turned financials into a powerful story that drove action.

Key Ideas:

1. **A Complete Financial Picture is Essential**: Ensure financial systems capture all critical data, from location costs to program-specific expenses.
2. **Ask Questions with Interest and Curiosity**: Approach with a beginner's mind and get curious. Build financials to answer the questions that matter most to leadership and the board.
3. **Empower with Tools**: Use dynamic tools like multi-year budget models to make financial data actionable and interactive.
4. **Connect Data to Strategy**: Show how financial decisions impact the organization's mission and long-term goals.
5. **Experiment and Make Choices with Awareness**: Financial management isn't static; it's iterative. Use models to test scenarios—whether adjusting tuition rates, changing staffing ratios, or exploring new programs—and analyze the outcomes. Awareness of the broader impact allows organizations to make intentional decisions.
6. **Narrative Matters**: Numbers alone don't drive change—pair data with a clear, compelling narrative to help stakeholders understand the "why" behind the "what."
7. **Clarity is Confidence**: When financials are presented clearly, stakeholders feel empowered to ask better questions and contribute meaningfully to decision-making.

Paint it Done checklist:

Discover:

- Review the chart of accounts: Does it reflect the organization's structure and priorities?
- Identify the levers: What financial data contributes to informed decisions?
- What information do key stakeholders need, that may not be currently available?

Envision:

- Design a financial structure that answers critical questions for your organization whether it's location, program or function specific.
- Imagine a dynamic tool for scenario planning and long-term budgeting that is scalable and re-usable.
- Align financial reporting with strategic goals.

Create:

- Rebuild the chart of accounts to reflect the organization's operations and priorities.
- Develop a multi-year budget model that allows for scenario analysis.
- Invite stakeholders to experiment with interactive tools and get curious.
- Regularly revisit and refine financial systems to ensure they remain relevant.

By transforming financials into a comprehensive, actionable story, you can empower your board and leadership to make smarter, more strategic decisions that drive meaningful outcomes.

Chapter 6: Building a Trustworthy Team—From Weak Links to Strength

A CFO's success is only as strong as the team supporting them. Financial systems can be rebuilt, tools can be introduced, and frameworks can be established, but those efforts can falter without a strong, trustworthy team. I learned this firsthand when I inherited an accounting team with a sole practitioner who was complacent and resistant to change.

The accounting manager, who did it all, well at least what she wanted to do, had been in her role for close to 20 years, running things her way with minimal oversight. While her workload was suitable for a part-time role, she had overcomplicated processes to fill 40 hours. Her focus was transactional rather than strategic, and there was a significant risk factor in how she approached her work. Basic practices, like seeking budget manager approval for expenses, recording information from source documents, providing monthly budget reports, had been neglected. The result was an operation brought to a standstill, as the accounting manager's overly complicated processes throttled the organization's ability to function. Budget Managers were putting charges on their credit cards, to avoid the process altogether, the credit card activity was posted without question. In reality, there was no team beyond the accounting manager. Her transactional focus and inefficiencies permeated every aspect of the operation, preventing progress. It became clear that the best solution was to outsource the accounting function entirely, allowing us to streamline processes and mitigate the risks her approach had created. With this in place, we could refocus resources on hiring a strong operations person to strategically lead and manage the office.

My first priority was to assess her strengths and weaknesses. I asked questions and encouraged the same curiosity from her, aiming to foster engagement and a drive for excellence. I wanted her to see that while we were not a revenue-producing unit, we were responsible for adding value to everything we did. As I observed workflows and listened to how she described her work, it became clear that her style had stifled innovation and development within the organization. Others had resigned to her style and accepted mediocrity, relying on outdated habits rather than adapting to the organization's evolving needs.

I realized this wasn't just about addressing individual performance but about elevating the work of the business office, conveying strength and demonstrating excellence.

Step 1: Address the Bottleneck

The first step was having honest conversations with the accounting manager about her approach and the critical risks it posed. I emphasized the need for change, offering guidance on how she could simplify processes and align with organizational goals. However, it became evident that she was resistant. She would nod and agree. But she had outlived 5 CFO's and I believe she was confident she would outlive me too. Ultimately, I decided to eliminate her position and implement outsourcing for the accounting function. This was the best solution for the organization as everything—from the chart of accounts to financial reporting - needed immediate attention. It would have taken a small team years to address these issues. An outsourcing firm brought the expertise and depth to resolve them in months immediately elevating the operation, showing us what our operation could be. Their bench strength allowed for swift, comprehensive improvements. With outsourcing in place, we could focus on hiring a strong operations person to ensure strategic leadership for the office.

Step 2: Refocus Resources

With the accounting function outsourced, I focused on hiring a strong operations person who could bring leadership and structure to the office. This role was designed to take ownership of day-to-day processes, ensure alignment with organizational priorities, and foster a proactive, solutions-oriented culture. Refocusing resources created a more strategic approach to operations that supported the organization's long-term success.

Step 3: Build Capacity

I introduced training opportunities and resources for the organization. From workshops on financial reporting to sessions on using new tools, I ensured the team had access to the knowledge and skills needed to succeed.

Step 4: Foster a Collaborative Culture

I encouraged open communication and created regular opportunities to share insights and ideas. We had open office hours where I was available to employees for them to ask questions, or learn something new, or propose a suggestion. This "everything is on the table" approach helped rebuild trust and reinforced the idea that everyone's contributions mattered.

Building a trustworthy team isn't just about replacing weak links—it's about creating a culture of growth, accountability, and collaboration. With the right people, clear expectations, and a commitment to continuous improvement, a strong team is a strategic asset to the organization.

Key Ideas:

1. **Leadership Shapes Culture**: A team's performance reflects the leadership it receives. Address gaps in leadership to unlock potential.
2. **Empowerment Drives Engagement**: Give team members ownership of their work to boost confidence and investment.
3. **Invest in Development**: Provide training and resources to build the team's capacity and skill set.
4. **Collaboration Builds Trust**: Create a culture of openness where team members feel valued and supported.
5. **Strategic Focus is Key**: Shift the team's mindset from compliance to strategic partnership.

Paint it Done checklist:

Discover:

- Assess team strengths and weaknesses: Where are the gaps?
- Observe workflows and leadership dynamics.
- Identify areas where training or support is needed.

Envision:

- Define the ideal team culture: What does success look like?
- Imagine a team that actively contributes to strategic goals.
- Align roles and responsibilities with organizational priorities.

Create:

- Provide feedback and coaching to address leadership gaps.
- Empower team members to own specific areas.
- Invest in training and professional development.
- Foster open communication and collaboration through regular meetings.
- Monitor progress and celebrate successes to reinforce growth.

By addressing weaknesses, empowering individuals, and fostering a culture of collaboration, you can transform your finance team into a trusted, strategic partner that drives organizational success.

Chapter 7: Leveraging Technology and Data—Modernizing for Insight and Efficiency

The days of relying on Excel are behind us. For today's CFOs, leveraging modern technology and data analytics is essential for driving insight, efficiency, and accountability.

I found a patchwork of disconnected tools and manual processes when I entered one organization. Individuals across the organization spent hours importing and exporting data across systems, and leadership was frustrated by the lack of timely, accurate reports. The solution? Modernizing the organization's technology infrastructure to create a unified, efficient, and insightful system.

We started with a poll of select families for their experience using our technology, using families first as a starting point. We received an earful. From different payment systems, to having to re-enter student information each year for fields that should be pre-filled, we began with the payment systems which needed to integrate with the accounting system. Our goal was to improve and elevate the experience of families, and employees. With better systems we had real-time data access, streamlined workflows, and automated reconciliations through file synchonization.

Beyond the tools, we introduced dashboards tailored to the organization's needs, providing leadership with instant visibility into key metrics like cash flow, receivables, top vendors, and donor retention.

We empowered decision-makers with real-time data for actionable decision-making, and technology became a strategic partner for storytelling and planning.

Key Ideas:

1. **Modern Tools for Modern Challenges**: Outdated systems cost time and accuracy. Upgrading to integrated, cloud-based platforms reduces inefficiencies and provides real-time insights.
2. **Improve the user experience:** Give constituents something to rave about. How many of us are frustrated with the customer service experience, this is our opportunity to elevate and show genuine care and concern for our customers.
3. **Dashboards as Storytelling Tools**: Visualizing data makes it accessible to non-financial stakeholders and fosters better decision-making.
4. **Invest in Training**: Technology is only as powerful as the people using it. Ensure staff are trained and confident in new systems.

Paint it Done checklist:

Discover:

- Evaluate current technology and identify gaps or inefficiencies.
- Engage customers for their experience as an end user.
- Gather input from stakeholders to understand their reporting needs.

Envision:

- Research tools that integrate with existing workflows.
- Families raving about how easy it is to engage with your organization
- Define key performance indicators (KPIs) and metrics for dashboards.

Create:

- Implement cloud-based systems and integrate platforms.
- Design dashboards that align with strategic goals.
- First class customer service leveraging technology
- Train staff on new tools and encourage feedback.

By embracing technology and data modernization, organizations can operate with greater clarity, confidence, and agility, enabling CFOs to lead with insight and impact.

Part 3: Strategic Resilience

This is where the work comes together and grows into a forward-thinking vision. Strategic resilience means planning for sustainability, embracing innovation, and adapting to change. This section explores how CFOs can leverage technology, navigate governance challenges, engage stakeholders, and ensure the organization is built to thrive—now and in the future.

Chapter 8: Overcoming Cultural Resistance to Change—Paving the Way for Progress

Change can feel like an uphill battle, especially in organizations where routines and practices have been entrenched for decades. Introducing new systems, processes, or mindsets often meets with resistance—not because people oppose progress, but because change can threaten their sense of stability and evoke feelings of loss. Overcoming this cultural resistance is one of the most significant challenges a CFO can face.

I saw this firsthand when I stepped into an organization that desperately needed modernization. Financial systems were outdated, workflows were inefficient, and the team hadn't evolved from their original practices. Despite clear evidence that changes were necessary, their protective response was strong. They resisted anything that could disrupt what had become familiar and comfortable.

As a coach trained in Gestalt methodology, I understood that resistance isn't inherently a negative force. From the Gestalt perspective, resistance happens when there's a gap in fully engaging with an idea, a person, or a situation. It's not about defiance—it's a signal that something is unresolved, whether it's unmet needs or deeper fears and concerns that are getting in the way.

The goal, then, is not to push through resistance but to meet it with curiosity, empathy, and intentionality. By doing so, we can transform resistance from a barrier into a bridge for meaningful progress.

Step 1: Start with Empathy

People resist change for many reasons, and from the Gestalt perspective, resistance often reflects a gap in making meaningful contact—with an idea, a process, or other people. This happens when something essential, like a need, concern, or fear, hasn't been fully addressed.

Resistance isn't defiance—it's a signal. It could reflect a fear of losing stability, a sense of identity tied to "the way things have always been," or even confusion about what the change means for them personally. For example:

- **Open Resistance**: Some resist outwardly, by questioning or arguing against the change.
- **Passive Resistance**: Others resist quietly, by avoiding tasks or delaying action.
- **Emotional Resistance**: Resistance can also look like overwhelm or withdrawal because the change feels too big to manage.

When you approach resistance with empathy, you can uncover what's truly driving it and address the root cause. For instance:

- **Fear of losing control?** Offer clarity and reassurance.
- **Fear of failure?** Provide training and a safe space to experiment and gain confidence.
- **Attachment to tradition?** Highlight how the change aligns with core values and strengthens the organization's future.

My first step was to meet individually with team members and key stakeholders to listen to their concerns and understand their perspectives. I wanted them to see me as a partner invested in their success.

In these conversations, I asked questions such as:

- What about the current system works well? What feedback do you receive?
- What challenges do you face in your day-to-day work?
- Where have you seen room for improvement?
- How do you raise your suggestions? Have you been able to implement your ideas?
- What would make your job easier or more fulfilling?

These questions weren't just about gathering information; they were about creating moments of contact. By meeting people where they were—emotionally, intellectually, and practically—I built trust and uncovered areas where the team genuinely wanted improvement. These conversations also helped me frame enhancements as solutions rather than disruptions.

Step 2: Communicate the Why

We've all experienced changes that were imposed on us without explanation or clarity, leaving us frustrated or disengaged. To counter this, I focused on clearly communicating the **why** behind the need to change and modernize. I connected modernization to the organization's mission and long-term goals. For example:

- Outdated systems weren't just inconvenient—they were hindering our ability to make data-driven decisions.
- Inefficient workflows weren't just frustrating—they were draining resources that could have been reinvested in programs and services.
- Failing to adapt wasn't just risky—it threatened the organization's sustainability.

From the Gestalt perspective, this step involved helping the team connect their work today to a clearer vision of the future. By showing them how change could serve their deeper values and aspirations, I aligned their motivations with the organization's priorities. This approach helped them make contact with the bigger picture, reducing the fear and uncertainty tied to change.

Step 3: Involve the Team in the Process

One of the most common opportunities missed is when leaders design and implement changes in isolation. To engage with resistance, I involved team members at every stage of the process. Whether it was rebuilding the chart of accounts, selecting an outsourcing firm, or designing new workflows, I invited their input and ideas.

For example, when introducing a new multi-year budget model, I asked team members to help test it and provide feedback. This didn't just improve the final product—it also gave them a sense of understanding with the changes I envisioned.

Gestalt teaches us that meaningful contact arises from co-creation. When people contribute to the design, they not only feel valued but also begin to see the change as something they helped build. This sense of ownership makes them more likely to support and champion the outcomes.

Step 4: Provide Training and Support

Resistance often stems from self-protection and fear of the unknown. To ease this, I prioritized training and support. When we outsourced the accounting function, I worked closely with the firm to ensure a smooth transition and held workshops to familiarize staff with the new systems and processes. I also made sure team members had ongoing access to resources and support.

This step was about creating a safe environment for learning and exploration—another key aspect of the Gestalt cycle of experience. By providing the tools and space they needed to engage with change, I helped them move from avoidance to action.

Step 5: Celebrate Early and Often

To build momentum, I highlighted and celebrated early successes. When the new chart of accounts allowed us to produce accurate, detailed financials for the first time, I shared the results widely. When the outsourcing firm completed months of overdue reconciliations in a matter of weeks, I made sure the team and board saw the impact.

These wins helped shift the narrative from fear to optimism. In Gestalt terms, celebrating successes allowed the team to fully experience the benefits of change, reinforcing their commitment to further progress.

Resistance signals where the system is stuck—whether that's fear, misunderstanding, or lack of engagement. Through empathy, clear communication, involvement, and support, you create opportunities for meaningful contact. Over time, this transforms resistance into connection, curiosity, and action, paving the way for sustainable progress.

Key Ideas:

- **Resistance Stems from Incomplete Contact**: Resistance reflects unmet needs or unresolved fears. Leaning in is key to overcoming it.
- **Empathy Builds Trust**: Listening to concerns and meeting people where they are fosters meaningful collaboration.
- **Communicate the Why**: Align changes with the organization's mission and long-term vision to reduce fear and inspire commitment.
- **Involvement Creates Buy-In**: Engaging the team as co-creators transforms resistance into ownership and support.
- **Celebrate Wins**: Sharing early successes allows the team to fully experience the benefits of change, building optimism and momentum.

Paint it Done Checklist:

Discover:

- Meet with team members to understand their concerns and perspectives.
- Identify pain points that changes can address.
- Assess where the system is stuck, resulting in resistance (fear, confusion, or lack of engagement).

Envision:

- Define the goals and benefits of the changes.
- Create a communication plan to explain the why behind the changes.
- Imagine a process where team members feel involved, valued, and aligned with the future.

Create:

- Design opportunities for the team to contribute to the change process.
- Provide training and ongoing support to help them complete the transition.

- Celebrate early wins and share success stories to build confidence.
- Monitor progress, address lingering concerns promptly, and reinforce contact where resistance persists.

By approaching resistance with empathy, transparency, and collaboration, and recognizing resistance as an opportunity to make contact, you can transform a culture of hesitation into one of progress and innovation.

Chapter 9: Balancing Risk and Sustainability—The Foundation of Long-Term Success

Risk and sustainability often go hand in hand. An organization that ignores risks jeopardizes its sustainability, while an organization without a long-term focus struggles to mitigate risks effectively. Balancing these two priorities for a CFO stepping into a messy operation is essential for ensuring financial health and operational resilience.

The risk wasn't on anyone's radar when I joined the organization. Decisions were reactive, processes were outdated, and the vision was murky and there was no roadmap for the future. Risks were embedded in nearly every aspect of the organization, from outdated systems, to deferred maintenance, to a quiet reputation, to unmonitored financial practices. This lack of attention to risk had created vulnerabilities that threatened the organization's sustainability.

Step 1: Identify Hidden Risks

The first step in balancing risk and sustainability is uncovering the hidden vulnerabilities within the organization. In my case, these included:

- **Deferred Maintenance**: Critical infrastructure issues have been ignored for years, leading to escalating repair costs. For example, while the carpet in some areas looked "good," it was 20 years old—far past its reasonable lifespan. More alarmingly, I discovered that the campus had no hot water because a water heater had been removed years earlier when it broke and never replaced. Additionally, the work order system was primarily used for setting up tables and chairs for events, rather than tracking and documenting repairs. This lack of a reliable repair history meant that critical issues, like a failed water heater, often went unnoticed until they became emergencies. These were not just inconveniences but signs of a neglected revitalization plan that put basic functionality and sustainability at risk.
- **Outdated Financial Practices**: Weak internal controls exposed the organization to errors and inefficiencies.
- **Reserve Funds**: While the organization had great reserves, these were often treated as a fallback for any problem in a given year rather than as part of a responsible financial model. Instead of creating an operational framework that worked successfully year after year, reserves were used to cover gaps, which masked underlying structural issues. Reserves are essential for doing more than simply balancing the budget—they strengthen the balance sheet and ensure financial health and prudence. As stewards of the organization, we owe it to our constituents to maintain generational equity and financial stability that allows us to fulfill our mission, even in times of uncertainty.

To address these risks, I comprehensively assessed the organization's financial and operational practices. By documenting and prioritizing the risks, I created a clear starting point for systematically addressing them.

Step 2: Build a Framework for Sustainability

Once the risks were identified, the next step was to create a framework that supported long-term sustainability. This meant shifting the focus from short-term fixes to proactive planning and resource allocation. I introduced a multi-year budget model that allowed us to:

- Plan for capital expenditures, such as facility repairs and upgrades.
- Build reserves to buffer against unforeseen challenges.
- Align resources with the organization's mission and priorities.

The multi-year model helped the board and leadership team see the financial impact of their decisions over time, making it easier to balance immediate needs with long-term goals.

Step 3: Engage Stakeholders in Risk Management

Addressing risk and sustainability isn't a solo effort—it requires buy-in from stakeholders at every level. I worked closely with the board, leadership team, and staff to foster a culture of shared responsibility. This involved:

- **Educating Stakeholders**: I provided clear, accessible information about the risks we faced and their potential impact on the organization.
- **Involving Stakeholders in Planning**: I invited input on prioritizing risks and developing solutions, ensuring everyone felt invested in the process.
- **Establishing Accountability**: I introduced regular reporting and monitoring to track progress on risk mitigation and sustainability initiatives.

Step 4: Take Strategic Action

With the framework and buy-in in place, we moved to action. Key initiatives included:

- Partnering with an outsourcing firm to address outdated financial practices quickly and efficiently.
- Updating the financial model and business plan for year over year sustainability and informed decision making.
- Creating a reserve fund policy ensured the organization maintained a financial safety net.
- Developing a maintenance plan to address deferred infrastructure issues proactively.

These actions mitigated immediate risks and laid the foundation for long-term sustainability.

Step 5: Monitor and Adapt

Risk and sustainability are dynamic, not static. As the organization evolved, so did its challenges. I implemented a system for regular reviews of financial and operational practices to ensure we stayed ahead of emerging risks and adapted our strategies as needed.

Taking a proactive approach to risk management and sustainability, we transformed vulnerabilities into strengths, weaknesses into opportunities. The organization became more resilient, better equipped to weather challenges, and positioned for sustainable growth.

Key Ideas:

1. **Risk and Sustainability Are Interconnected**: Ignoring risks undermines sustainability, while proactive risk management supports long-term success.
2. **Start with Assessment**: Identifying and prioritizing risks provides a clear roadmap for action.
3. **Plan for the Long Term**: Multi-year budgeting and resource allocation are essential for balancing immediate needs with future goals.
4. **Engage Stakeholders**: A culture of shared responsibility ensures risks are addressed collaboratively.
5. **Monitor and Adapt**: Regular reviews keep risk management and sustainability efforts relevant and effective.

Paint it Done checklist:

Discover:

- Conduct a risk assessment: What vulnerabilities exist in your financial and operational practices?
- Identify areas where deferred maintenance or outdated systems pose threats.
- Review your reserve policies: Do you have a financial safety net?

Envision:

- Define what sustainability looks like for your organization.
- Create a multi-year budget model to align resources with long-term goals.
- Imagine a culture where stakeholders actively engage in risk management.

Create:

- Develop a prioritized plan for addressing risks.
- Establish reserve fund policies and capital expenditure plans.
- Introduce regular reporting and monitoring to track progress.
- Foster open communication about risks and their impact on the organization.

By balancing risk and sustainability, you can ensure your organization is protected against vulnerabilities and positioned for long-term success.

Chapter 10: Rethinking Revenue Generation—Beyond Tuition Dependency

Financial sustainability can feel precarious for organizations heavily reliant on a single revenue source, like tuition. Many of my clients fall into this category, with the majority of their income coming from tuition, supplemented by contributions and investment income. While this model may seem stable on the surface, it leaves little room for growth, innovation, or resilience in the face of unexpected challenges.

When I step into these organizations, my approach is clear: stick to who you are. Don't try to be something different. Instead, come from a place of strength. Avoid apologizing, defending, or overexplaining. Create opportunities for people to talk about your organization—and let them. How many times have we had terrible experiences where we weren't met where we were? This is our opportunity to meet people where they are and demonstrate care through our work.

The solution isn't about forcing change or chasing trends. It's about aligning revenue generation with the organization's unique strengths and values, creating meaningful connections that inspire support and loyalty.

Step 1: Assess Current Revenue Streams

The first step is understanding exactly where the money comes from and how dependent the organization is on each source. We break revenue into three main categories:

- **Single Source (e.g., tuition):** Assess the proportion of revenue derived from tuition and evaluate how sensitive the community is to price increases. Are tuition rates perceived as equitable and aligned with the value provided?
- **Contributions:** Evaluate donor engagement. What is the participation rate, and what is the average gift size? Are donors motivated and appreciated?
- **Investments:** Analyze the performance of endowments or other investment income. Is the strategy overly conservative or aggressive compared to market conditions?

This assessment highlights the risks of over-reliance on a single source and identifies areas of strength to build upon.

Step 2: Explore Diversification Opportunities

With a clear understanding of the current revenue streams, the next step is to brainstorm ways to diversify while focusing on initiatives that generate high returns and raise visibility.

Mission-Aligned Ventures

Develop unique programs that serve the organization's purpose and attract community participation. Examples include:

- **Signature Events:** Create cornerstone events, such as an Authors and Ideas Festival or a Summer Writing Retreat, to boost visibility and revenue while reinforcing the mission.
- **Educational Enrichment Opportunities:** Offer workshops, lecture series, or hands-on experiences tied to your mission, such as summer storytelling programs or STEM challenges.
- **Differntiated offerings**: Introduce or elevate a unique program that embodies your mission, such as a capstone project, design thinking lab, or grown up course for kids - "Big Ideas for Young Minds" Introduce age-appropriate themes for topics such as elevating a service learning program into something more strategic, aspirational, and impactful.
    - Philosophy with focus on logic, debate, and ethical reasoning.
    - Philanthropy emphasizing active giving, leadership, and social responsibility.

Partnerships with Local High-End Businesses

Collaborate with businesses that serve clients with disposable income—like realtors, spa owners, jewelers, and upscale dry cleaners—to build mutually beneficial relationships:

- **Realtors:** Partner on welcome packages for new homeowners, featuring branded materials or event tickets, to introduce the organization as a vital community resource.
- **Spa Owners and Jewelers:** Launch co-branded campaigns where a percentage of sales supports scholarships or mission-aligned programs.
- **Dry Cleaners:** Create campaigns like "Refresh for a Cause," where a portion of proceeds supports the organization, reinforced by branded tags or materials.

These partnerships allow organizations to tap into new networks, raise visibility, and attract supporters who value quality and community connection.

Mission-Based Merchandise

Collaborate with local artisans to create branded items like mugs or totes featuring student artwork. These items build pride and visibility while generating revenue.

Collaborative Initiatives

Partner with local nonprofits or schools for joint events, like leadership conferences or regional festivals. Sharing resources and audiences expands reach and reduces costs. Think of it like CVS and Walgreens, or Burger King and McDonald's—each thrives because the other helps solidify the market ethos.

Step 3: Engage the Community

Revenue generation isn't just about new ideas; it's about deepening relationships. Organizations have the opportunity to create experiences that leave people feeling seen and valued, inspiring them to become champions for the mission.

- **Activate Ambassadors:** Identify engaged supporters and invite them to advocate for initiatives by hosting gatherings, sharing stories on social media, or mentoring new donors.
    - Form a Board of Visitors composed of local government leaders, entrepreneurs, and business partners to facilitate meaningful conversations about education and its role in shaping future entrepreneurs. This approach builds relationships, enhances visibility, and attracts corporate and philanthropic support for mission-aligned initiatives.
- **Leverage Personal Stories:** Encourage supporters to share their experiences, creating powerful testimonials that resonate with potential donors.
- **Meet People Where They Are:** Build engagement opportunities that feel natural and aligned with supporters' interests. Provide flexibility while ensuring ambassadors operate within the organization's framework to avoid unintended messaging.
- **Recognition and Reward:** Publicly celebrate contributions and successes. Gratitude fosters loyalty and inspires others to get involved.

By focusing on relationships and authenticity, you transform supporters into advocates who love sharing your story with others.

Step 4: Implement and Iterate

Start small, test ideas, and refine them. For example, a pilot program offering mission-based merchandise might reveal what resonates most with families and alumni. Similarly, an initial partnership with a local business could open doors to broader collaborations. The key is to remain flexible and learn from each effort.

Step 5: Build for the Long Term

Revenue generation isn't a one-time effort—it's about creating sustainable systems. This includes:

- Building institutional knowledge about successful initiatives.
- Establishing annual plans for engagement and revenue growth.
- Reinforcing a culture of pride and authenticity in every interaction.

By coming from a place of strength and authenticity, organizations can reduce financial risks, build stability, and inspire lasting loyalty.

Key Ideas:

- **Stick to Who You Are:** Authenticity resonates. Build on your strengths rather than trying to emulate others.
- **Focus on Connection:** People support organizations they love and feel aligned with. Build experiences that create joy and pride.
- **Engage Ambassadors:** Activate supporters to amplify your efforts in natural and rewarding ways.
- **Avoid Overwhelming Families:** Be strategic and intentional when asking to avoid donor fatigue.
- **Test and Refine:** Pilot ideas, learn from results, and scale successful initiatives.

Paint it Done Checklist:

Discover:

- Break down current revenue streams: What are the percentages for tuition, contributions, and investments?
- Identify areas of strength within your organization's identity and mission.
- Assess untapped community or local business opportunities.

Envision:

- Imagine revenue strategies that align with your mission and build pride.
- Brainstorm ways to deepen relationships with your community.
- Define success in terms of engagement and sustainability.

Create:

- Pilot small, mission-aligned initiatives.
- Activate ambassadors and community partnerships.
- Track results and gather feedback to refine strategies.
- Build long-term plans for sustainable revenue growth.

By embracing authenticity, connection, and strategic partnerships, organizations can inspire support, create lasting impact, and build a foundation for long-term financial sustainability—all without losing sight of their identity.

Chapter 11: Pivoting Under Pressure—How Disruption Sparked Innovation

Just as the organization was hitting its stride, leveraging their strengths and partnerships, and finally seeing the fruits of its efforts, something unexpected happened. An event that no one could have predicted threw our carefully laid plans into disarray, and suddenly, everything was at risk.

It wasn't just a minor setback. It was a disruption that could derail months of progress, and swift action was required.

The disruption started with a sudden staffing crisis. Two key staff members, who were central to program delivery and operations, unexpectedly departed within the same month. The loss left critical gaps in expertise and capacity, and the team was stretched thin with loss of institutional knowledge. It became clear that we needed help.

At first, the team powered through. We can do this, we can shuffle things around to meet the needs of our community and reduce responsibilities to meet the immediate needs. The situation was overwhelming, but that had become normal. Morale took a hit as a select few tried to take on additional responsibilities.

We needed to regroup. A reactive job posting to see if we could replace the departed employees, nudged an opportunity to innovate. The responses were weak to the ad, and we began to explore creative solutions to fill the gaps and improve resilience.

We started by identifying which tasks were most critical to our mission and which could be streamlined or outsourced. Some administrative tasks were shifted to external partners, freeing up internal resources to focus on direct service delivery. We piloted program to engage community members more deeply in our work. By leveraging their skills and enthusiasm, we not only addressed immediate needs but also strengthened our ties to the community.

We also restructured roles within the organization to align better with individual strengths and interests. Functional job description resulted and staff members were encouraged to adopt a leadership mindset, providing growth opportunities while addressing organizational needs. Cross-training was implemented to ensure that knowledge and responsibilities were shared more broadly, reducing reliance on any one individual.

The staffing crisis ultimately led to a stronger, more adaptable organization. The changes we made didn't just fill the gaps—they enhanced our ability to respond to future challenges and created a more collaborative and engaged team culture.

The disruption taught us one of the most valuable lessons: every challenge is an opportunity to rethink how we work. By staying curious, asking the right questions, and embracing change, we turned a difficult situation into a chance to build a more resilient and innovative organization.

Key Ideas:

- **Disruptions Are Inevitable**: Challenges and unexpected changes are part of every organization's journey.
- **Flexibility Is Key**: Adapting quickly to new circumstances is essential for success.
- **Innovation Emerges From Crisis**: Disruptions often lead to creative solutions and unexpected growth.
- **Collaboration Drives Solutions**: Engaging staff, volunteers, and external partners can uncover hidden opportunities.
- **Resilience Through Adaptation**: Cross-training and role restructuring build long-term strength.

Paint it Done Checklist:

Discover:

- Review roles within the organization, and how they are filling needs of organization.
- Assess current resources: What can be shifted or delegated?
- Gather input from the team: What solutions do they propose?

Envision:

- Consider creative staffing solutions: How can volunteers, partnerships, or cross-training embolden and strengthen the organization?
- Explore role restructuring: What new opportunities can emerge from the changes?
- Visualize success: What does a more resilient team look like?

Create:

- Develop a detailed plan for addressing gaps in functions.
- Pilot a volunteer program or external partnerships to fill immediate needs.
- Implement cross-training and leadership development initiatives.
- Monitor progress and refine the approach based on results and feedback.

By embracing disruptions as opportunities to innovate, organizations can survive unexpected challenges and thrive in entirely new ways.

Chapter 12: Navigating Board Dynamics and Governance—Strengthening Strategic Leadership

A CFO's role isn't limited to financial management—it's also about fostering effective collaboration with the board. Strong governance is the backbone of a successful organization, and navigating board dynamics requires both strategic acumen and emotional intelligence.

At one organization, I found a highly engaged board that often overstepped its bounds in operational matters. The board's intentions were good—they wanted to help—but this created friction with the management team. The result was inefficiency, confusion, and frustration on all sides.

We implemented a governance framework that clarified roles and responsibilities to address this. The board's focus shifted back to strategic oversight, while the management team retained control over day-to-day operations. We also introduced a series of financial workshops for board members, equipping them with the tools to better understand the organization's financial health without micromanaging.

Another key initiative was improving communication. We built trust and alignment by providing clear, concise financial reports and linking them to organizational goals. Board meetings became more productive, with discussions centered on strategic priorities rather than operational details.

Lastly, board recruitment played a critical role in this transformation. Instead of passively accepting interested individuals, we actively recruited members based on the skills, expertise, and diversity needed to round out the board. A balanced approach ensured we avoided having too many current parents on the board, which can sometimes limit objectivity. Instead, we sought individuals who could think outside the box while also valuing those who were fastidious about details. By identifying gaps and seeking candidates with complementary strengths—such as legal, marketing, or community connections—we built a well-rounded team capable of providing meaningful strategic guidance.

Key Ideas:

1. **Define Roles Clearly**: Establish a governance framework that separates strategic oversight from operational responsibilities.
2. **Equip the Board with Knowledge**: Financial literacy workshops empower board members to make informed decisions.
3. **Active Recruitment**: Identify gaps in board skills and actively seek members who complement the existing team.
4. **Balance Perspectives**: To create a well-rounded team, ensure the board includes a mix of innovative thinkers and detail-oriented members.
5. **Build Trust Through Communication**: Transparent, goal-oriented reporting fosters alignment and trust.

Paint it Done checklist:

Discover:

- Assess current board dynamics and identify pain points in governance.
- Review bylaws and policies to ensure clarity on roles and responsibilities.
- Evaluate the skills and expertise of current board members to identify gaps.

Envision:

- Define the ideal relationship between the board and management.
- Develop a plan for proactive board recruitment.
- Create a vision for better communication and reporting.

Create:

- Implement a governance framework with clear role definitions.
- Actively recruit new board members based on identified needs.
- Provide regular financial training for board members.
- Streamline financial reporting to focus on strategic insights.

Strong governance creates a foundation for strategic leadership and ensures that the board and management work harmoniously toward the organization’s goals. By fostering trust, clarity, and alignment—and recruiting strategically—CFOs can turn governance into a competitive advantage

Chapter 13: Strategic Planning—A Living, Breathing Tool for Growth

Strategic planning often conjures images of thick binders sitting untouched on a shelf, gathering dust. However, effective strategic planning should be the opposite—a dynamic, interactive process that evolves alongside the organization and engages the entire community.

I discovered a strategic plan at one organization that hadn't been updated in years. The goals were outdated, the metrics irrelevant, and leadership referred to it as "a checklist no one follows." The result? The organization was operating without a cohesive vision, and decision-making lacked focus.

We reimagined strategic planning as an ongoing, inclusive conversation to change this. Instead of creating a static document, we developed a flexible framework that could adapt to changing circumstances. Community engagement became central to the process, with staff, board members, and key stakeholders contributing their insights and ideas.

We introduced interactive workshops and regular check-ins to ensure the plan remained relevant and actionable. Key performance indicators (KPIs) were tied to the organization's mission, and progress was reviewed quarterly. This approach created accountability while also fostering a sense of ownership among all participants.

One of the most impactful elements was the creation of a living dashboard—a real-time visualization of strategic goals, metrics, and progress. Accessible to both leadership and staff, this tool became a central hub for decision-making and collaboration. It ensured that everyone stayed aligned and could see how their contributions drove the organization forward.

Key Ideas:

1. **Strategic Planning as a Framework**: Replace static plans with dynamic, adaptable frameworks.
2. **Community Engagement**: Involve stakeholders at every level to foster ownership and alignment.
3. **Living Dashboards**: Use real-time tools to track progress and keep the plan actionable.
4. **Regular Check-Ins**: Review goals and KPIs quarterly to ensure the plan remains relevant.

Paint it Done checklist:

Discover:

- Evaluate the current state of strategic planning and identify gaps.
- Gather input from staff, board members, and stakeholders about organizational priorities.

Envision:

- Define a vision for a dynamic, community-driven strategic plan.

- Identify key metrics and goals that align with the organization’s mission.

Create:

- Develop a flexible framework with room for adaptation.
- Build a living dashboard to visualize goals and track progress.
- Schedule regular workshops and check-ins to maintain engagement and accountability.

Strategic planning should be a living, breathing tool that reflects the organization’s mission, adapts to its needs, and unites the community around shared goals. By making it interactive, CFOs can ensure that strategic planning drives meaningful, measurable growth rather than collecting dust on a shelf.

Conclusion: The Journey Ahead

Through these mysteries, I've learned that every organization has hidden opportunities waiting to be discovered. The key is curiosity, care, and the courage to ask the right questions. Whether uncovering inefficiencies, building stronger teams, or creating sustainable strategies, the role of a CFO is about much more than balancing the books—it's about shaping the future.

This book is just the beginning of the conversation. Every organization's challenges and opportunities are unique; navigating them requires collaboration, creativity, and commitment. As you reflect on the stories and strategies shared here, I invite you to think about your own organization. What mysteries remain unsolved? Where can curiosity and care drive change?

I'd love to work with you if you're ready to explore these questions further. Whether it's solving a specific challenge, building a stronger financial foundation, or crafting a forward-thinking strategy, I'm here to help. We can uncover hidden opportunities and create a plan for sustainable success.

Let's connect and chart the path forward—one discovery at a time.

Trish

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Unlock Your Organization’s Potential

These pages are more than a guide—they’re an invitation to rethink what’s possible. Through compelling stories and actionable insights, Patricia (Trish) Doon offers a fresh perspective on uncovering hidden opportunities and tackling challenges with curiosity and care.

With a knack for transforming complexity into clarity, Trish helps organizations turn roadblocks into stepping stones and unlock their true potential.

Ready to chart a new course? Open the book and start discovering the possibilities.

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