



Primary Location:

Australia and New Zealand

Qualifications

Master of Business (Research)
Queensland University of Technology
Defining attributes of a financially sustainable school

Graduate Diploma
Company Directors Course

Certificate IV
Workplace Training and Assessment

Graduate Diploma
Applied Finance and Investment

Professional Year
Institute of Chartered Accountants

Bachelor of Commerce
University of Queensland

Accreditations/Memberships

Graduate Australian Institute of
Company Directors

Fellow Financial Services
Institute of Australasia

Fellow - Chartered Accountants
Australia and New Zealand

Vision

To be the respected source of simple, intuitive tools and advice for governors, management and others interested in financial viability and sustainability of schools and the sector

I have 33 years experience in chartered accounting with a passion for financial governance of schools. My goal is to provide peace of mind and insight for school governors, senior executives, and others interested in the financial viability and sustainability of their school and the sector and to therefore **govern with confidence**.

My experience in school board governance and training includes financial viability/sustainability assessment and improvement, capital expenditure and borrowing analysis, budgeting, board reporting, and using key performance indicators (KPI's) to inform decisions and manage financial risk.

For twenty-five years, I have operated a financial benchmarking survey for non-government schools in Australia and New Zealand with the Association of School Business Administrators Limited. The survey includes almost 700 schools representing over 70% of the Independent schools' market (based on student enrolments). 10 out of 10 participants recommend the survey to others.

My 2017 masters research thesis which identified a range of financial, non-financial, leadership and management attributes of a financially sustainable non-government school helps to inform advice and decisions.

Career highlights include serving as an industry expert in the financial governance of schools - helping establish a financial viability framework for the industry. Other highlights include director of Independent Schools Queensland for eighteen years (seven years as chair), and director of Independent Schools Council of Australia in which I sought to make a positive contribution to the Queensland and Australian community.

Passion and Values

- Financial **viability and sustainability** of schools and the sector
- Integrity, professionalism, simplicity

Core Expertise

- Financial **governance** and **risk management** of Schools
- Financial **benchmarking online tool**
- Financial **viability/sustainability** and performance improvement
- **Training** of school boards and management on financial governance
- Budgeting and board reporting **tools**.

Appointments

- Director - Independent Schools Council of Australia (2011 - 2018)
- Chair - Independent Schools Queensland (2011 - 2018)
- Treasurer - Independent Schools Queensland (2001 - 2011).
- Director - St Stephen's College, Coomera (2004 - current)
- Chair Finance Committee - St Stephen's College (2004 - current)
- Risk Assurance Committee - St Stephen's College (2004 - current)
- Finance Committee and Council - St Paul's School, Bris. (2000 - 2008)
- Chairman - St Paul's School Foundation (2006 - 2008)