



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 37 years' experience in chartered accounting with 28 years specialising in the financial governance of non-government schools. My goal is to provide insight and reduce financial worries for school governors, principals, business managers and the broader sector - helping to **govern with confidence**.

My experience in school 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-eight years, I have operated the Financial Survey for Schools (FSS) in Australia and New Zealand. About 700 schools participate each year with 10 out of 10 recommending it to others. Participation in the FSS helps owners, governors, principals, and business managers access simple, factual, trend and comparative financial information to identify changing circumstances plus areas that will have the greatest impact on improved financial performance.

My 2017 masters research thesis identified a range of financial, non-financial, attributes of a financially sustainable non-government school. I am currently extending this research with a PhD to predict financial sustainability.

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 Australia in which I sought to make a positive contribution to the broader 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 – Riverside Christian College (2021 - continuing)
- Director - Independent Schools Australia (2011 - 2018)
- Chair - Independent Schools Queensland (2011 - 2018)
- Treasurer - Independent Schools Queensland (2001 – 2011).
- Director - St Stephen's College, Coomera (2004 – 2020)
- Chair Finance Committee – St Stephen's College (2004 - 2020)
- Risk Assurance Committee – St Stephen's College (2004 - 2020)
- Finance Committee and Council - St Paul's School, Bris. (2000 – 2008)
- Chairman - St Paul's School Foundation (2006 – 2008)