



Smith+Howard

Leveraging External Resources to Help Reduce Overhead Costs, Improve Financial Reporting, and Streamline Processes

Who: Heads of School, CFOs

When: Tuesday, April 22nd, 2025 from 9:00 to 10:00 a.m.

Where: Virtual on Zoom

Presentation Description

“Independent schools face increasing financial complexities, from maintaining operational efficiencies to ensuring their school’s financial sustainability. This session will explore how schools can optimize their financial operations through strategic outsourcing, including fractional support. We will discuss how leveraging external resources can help reduce overhead costs, improve financial reporting, and streamline processes. Additionally, we will introduce a structured approach to evaluating the effectiveness of a school’s business office, identifying potential improvements in policies, information systems and staffing. Attendees will gain insights into best practices that support long-term efficiencies and effectiveness, allowing school leaders to focus on their core educational mission.”

Presenters

Eric Norman, CPA

Director, Business Office Services | Independent Schools

Eric is a financial and operational leader with over 27 years of experience as a Chief Financial Officer in the independent school and higher education sectors. Prior to that, he spent nine years at PwC, specializing in audit and consulting for independent schools and the construction/real estate industries. Throughout his career, he has overseen school finances, investments, human resources, IT, security, and facilities, including leading major capital projects. He has also driven two full mergers in higher

education, launched an investment advisory business with school trustees, and restructured finance offices through outsourcing initiatives.

In his role at Smith + Howard, Eric leads the firm's Outsourced Business Services practice for independent schools. He is responsible for the implementation, growth, and delivery of fractional financial services and strategic assessments tailored to independent schools.

Jackie Young

Manager, Business Office Services | Independent Schools

Jackie brings extensive experience in independent school business operations, with a strong background in student billing, bookkeeping, and financial administration. She has worked with multiple schools in an outsourced capacity, with expertise in platforms such as FACTS, QuickBooks, and BILL.

As a Manager in Smith + Howard's Business Office Services practice, Jackie plays a key role in assessing and structuring outsourced financial services for independent schools. She collaborates closely with school leadership to build strong client relationships, manage business office assessments, and ensure smooth financial operations.

Originally from Bethlehem, PA, Jackie has spent her career deeply embedded in school communities, having served as a teacher, bookkeeper, and Associate Director of Business Operations.

- This is a **FREE** event