

Colegio Técnico Privado Antonio Raimondi

Executive Summary

Student Consultant, Hermona Tamrat
Community Partner, Rafael Azerrad

I. About the Organization

Colegio Técnico Privado Antonio Raimondi is a private school in Pucallpa, Peru that provides K-12 education that is divided into three school: la Escuela Inicial (Initial School), la Escuela Primaria (Primary School), and la Escuela Secundaria (Secondary School). There are currently 535 students enrolled at Colegio Antonio Raimondi and 57 members of faculty and staff. Rafael Azerrad, the son of Cecilia Urrutia, has been the Director of the school since the beginning of the last school year, March 2011.

The mission of Colegio Técnico Privado Antonio Raimondi is to bring up students of high morals, ambassadors of peace, in which permanent and natural practice of moral values, civic and Catholic, mark their behavior; with solid academic preparation, technique and ample culture that allows them to pursue higher education or successfully enter the work force.

Colegio Antonio Raimondi was founded by the Architects Cecilia Urrutia Ferradas, now the legal representative of the school, and the late Elena Lugon Ceruti in December 1991. The school is now owned 100% by Cecilia, her husband Alberto Azerrad Araujo, and their four children.

The school grounds are spacious and provide sufficient facilities for all students. The school program and curriculum is comprehensive that includes computer classes. Colegio Antonio Raimondi provides a warm and welcoming environment for children to learn and grow into upstanding productive citizens. A few sources of trouble for the school are the organization and administrative procedures as well as the management of technology infrastructure.

II. Propose Family Business Succession Planning

Because of the unique history of the school, the administrative organization lacks some structure which causes inefficiency and a great deal of lost time. The school that now services a few hundred students cannot run as a small family, like in the first years. Upon further investigation and looking at the issue from a broader lens, this change in organizational structure is one part of a larger process: the transition process between the original family business owner and the next generation of owners. This is a lengthy planning process that takes participation from all parties and great communication, an especially difficult task in a family business.

After extensive research, I presented to Cecilia Urrutia, her husband Alberto, her son Rafael Azerrad, and her three other children my findings on the difficulties and opportunities of a succession in a family business. I shared six planning models explaining two in greater detail that I felt was more appropriate for the size and type of business. The family received the idea very positively and appeared extremely interested in beginning the planning process as soon as possible. Because this is a lengthy process that is easily pushed aside or deferred in many family business,

my recommendation is to keep the planning process at the forefront. It is also vital to open communication channels and establish regular family meetings with planned agendas. Finally, I recommend that professionals are involved in the process early on, which will also encourage the family to stay on top of the task.

III Develop Web Presence

The school does not have a website to communicate with the public. One of the problems facing the school is the relationship with the parents. An informative website with information such as weekly events could significantly improve relations between the school and the parents as well as the greater public. As one of only three private schools in Pucallpa, Colegio Antonio Raimondi is a leading educational establishment of such caliber that a website is expected. Improving this relationship with parents is important because the current breaks in the flow of information is resulting in wasted time of both the parents and the Director Rafael. Having a website is also key for communicating to a wider public such as potential donors, alumni, and prospective students.

I have created the complete shell for the new website using the updated Joomla! Spanish 2.5.6 with a new design. I created a detailed outline of all the content needed for the site which Rafael will write and can then easily insert into the already created pages. Once completed, the site will be a great source of information and a positive representation of the school.

IV Additional Recommendations

As described in Section 1, two additional projects that would improve the school are establishing a network and developing software to manage their information more successfully. Rafael would like to set up two networks to be able to manage all the computers on campus.

Any business, particularly a school, needs an efficient system to manage information that is easily input and extracted. By investigating and adopting the best software for this particular school, the flow of information would be much more efficient and accurate. This is a project that can potentially be completed by future TCinGC consultants. Carnegie Mellon has a vast pool of candidates that, if Colegio Antonio Raimondi is interested in continued work with TCinGC, have expertise in this area.

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Page 2 of 10
August 11, 2012

Colegio Técnico Privado Antonio Raimondi

Final Consulting Report

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I. About the Organization

Organization

Colegio Técnico Privado Antonio Raimondi is a private school in Pucallpa, Peru that provides K-12 education for the community. There are three main components of the school: la Escuela Inicial (Initial School), la Escuela Primaria (Primary School), and la Escuela Secundaria (Secondary School). This would be the equivalent of a K-12 school, including pre-school, in the United States. La Escuela Inicial is for students age 18 months to 5 years. This is not included as basic education required by the Peruvian Ministry of Education. La Escuela Primaria includes grades 1 to 6 for students age 5 to 12 years. La Escuela Secundaria includes grades 7 to 12 for students age 12 to 18 years. There are currently 535 students enrolled at Colegio Antonio Raimondi and 57 members of faculty and staff. Rafael Azerrad, the son of Cecilia Urrutia, has been the Director of the school since the beginning of the last school year, March 2011.

The mission of Colegio Técnico Privado Antonio Raimondi is to bring up students of high morals, ambassadors of peace, in which permanent and natural practice of moral values, civic and Catholic, mark their behavior; with solid academic preparation, technique and ample culture that allows them to pursue higher education or successfully enter the work force.

Colegio Antonio Raimondi was founded by the Architects Cecilia Urrutia Ferradas, now the legal representative of the school, and the late Elena Lugon Ceruti in December 1991. The school was established with the intention of creating an institution to provide a quality modern education to the people of the Ucayali region, and more specifically the city of Pucallpa. The four legal owners of the school were Cecilia Urrutia, Elena Lugon, and their husbands. The school is now owned 100% by Cecilia, her husband Alberto Azerrad Araujo, and their four children.

In March 1992, the beginning of the first school year, Colegio Antonio Raimondi had 235 students and 27 members of faculty and staff. School was held in shifts, meaning students in Initial and Primary School had class in the morning and students in Secondary School had class in the afternoons. This type of schedule was adopted to accommodate all students in the small school building being used at that time. The student body grew steadily over the years and the school changed to its current location in 1997 to accommodate the increasing number of students. The school had the most enrolled students in its history in 2008 with 678 students. In recent years, the student body has decreased due to administrative problems that have hurt the school's relationships with parents and community members.

Facilities

The school grounds are a gated and secure compound comprised of a number of small individual one-story buildings. There are a total of 31 classrooms, one science laboratory, two computer labs with 50 computers, a projection room, a recreational area, one conference room, one sport's pitch,

one half size Olympic Pool, and one multipurpose space used for anything from sports games to staff meetings. The first buildings upon entering the school grounds hold the administrative offices and are two stories. Additionally, in these administrative buildings are the computer labs.

All of the teachers were recently lent money from the school for the purchase of a new laptop to be used in the classroom. Some classrooms have recently been installed with new television monitors to connect the laptops to and conduct class lessons. In the future, Rafael plans to install monitors in every classroom but is taking this initial step with only a handful of monitors as a trial period.

The internet access throughout the grounds is inconsistent. Wireless internet access is only available in a select region of the campus. This is due primarily to the 600 kbps connection at Colegio Antonio Raimondi, because that is all that is currently available by the *Telefonica* internet service providers here in Pucallpa. This means that more than a few internet users at a time cannot be supported.

Programs

Colegio Antonio Raimondi offers high level education for students from age 18 months to 18 years. As required by the Peru Ministry of Education, the school provides both primary and secondary education, 1st to 12th grade. The school also offers "initial education", which is equivalent to pre-kindergarten and kindergarten. This is not obligatory but an additional service offered by the school. Finally, the school also offers an after-school care program for 2 hours every day during which time the students are encouraged to complete their homework while parents can remain at work. Colegio Antonio Raimondi offers a comprehensive education including Reading, Writing, Mathematics, Natural Sciences, Social Sciences, Computer Science, Physical Education, Art, and English.

Computer education begins at 4 and 5 years, the final year of Initial School, at Colegio Antonio Raimondi. Students have class and are taught the basics of computer use. Primary school holds computer class once a week for 2 hours and secondary school is twice a week for two hours. How to use mouse and become familiar with the computer is the focus of the classes for Primary school students. Thus programs such as Paint and Microsoft Word, Excel, and PowerPoint are the central focus. In Secondary school, the students first review the Microsoft programs with which they should already be familiar. Students are then taught how to program with Visual Basic, how to use Microsoft Access, how to make animations with Flash, how to edit photos in Photoshop, and how to program for web development. By graduation, students ideally should know how to use Microsoft Office Suite, how to edit images and photos, and create small programs using Visual Basic and web tools.

Staff

There are 57 members of the faculty and staff of Colegio Antonio Raimondi. There are 43 teachers, 8 administrators, and 6 maintenance and facilities managers. Rafael Azerrad's tasks as Director include managing and overseeing all that occurs on campus. He also is the primary contact for the parents of the school and thus has the primary role in establishing and maintaining school-parent relationships. His background is not in school administration, however. Rafael studied to be a software developer at Universidad de Lima (University of Lima). He returned to Pucallpa from Israel early in 2011 to support his mother in running Colegio Antonio Raimondi. Additionally, Rafael teaches the Secondary school computer classes.

Beybi Esteban Vargas is the head of technical support here at the school. He is called upon for every type of event or need where any type of technology is used. He also repairs whatever equipment he can when there is a failure.

Technical Environment

There are a total of 50 computers at Colegio Antonio Raimondi in 2 computer labs. All the computers run on a Windows XP operating system and are installed with Windows Office 2007. Some of the programs installed in the computers are Office 2007, Visual Basic.NET, and Flash. One computer lab is equipped with computers that were installed 3 years ago. These machines run well and effectively for the purposes of the school. The second computer lab has computers from 12 to 18 years old. These machines have a myriad of problems every day.

One of the labs, the one with the newer computers, has wireless internet connection when needed. The router is only turned on when necessary because when used by a large number of people, the speed slows down significantly, leaving it virtually useless for administrators in their offices to use at the same time as the students in the computer lab.

The computer are not currently set up on a network but Rafael hopes to soon set up two networks at the school; one for administrative purposes and one for educational purposes.

Technical Management and Planning

There is no technology management and planning system at Colegio Antonio Raimondi. Beybi Esteban is the technical go-to person on campus. He and Rafael fix, if possible, any failed technology infrastructure on an as-need basis. Problems are not reported or logged here, but repaired to the best abilities of the staff here at Antonio Raimondi. There are no external support sources here in Pucallpa.

Similarly there is no established technology planning. Rafael, as Director and one of only two Technical Support staff members, does all that can be classified as technology planning. There is no specified budget for technology infrastructure. For example, Rafael would like to purchase another 20 or so computers and set up a third computer lab with available money in the school budget. There is no system in place to propose and make a decision on this purchase, just the criteria of there being enough money in the budget to support this idea.

Director Rafael Azerrad is very much aware of the problematic nature of the current lack of technology management and planning. Not only will this improve the organization and flow of information between the faculty and staff of the school, but Colegio Técnico Privado Antonio Raimondi is a technical school by name. Thus well maintained technology infrastructure that is properly managed is expected. Rafael does hope to change this in the future but has not yet made a plan to do so, though not because of disinterest but a lack of time in his daily schedule.

Internal and External Communication

Information is not well communicated externally. There is very little on the web about the school to inform the public or the parents of students. The school has a facebook page that is updated sporadically with photos of events at the school, but little information of the school is shared there.

Files can be shared internally through the current network but there are only a few computers set up on the network. In the future, Rafael hopes to have two networks, one for administrative purposes and one for educational purposes in the computer labs.

An email account has been set up on the gruporaimondi.com domain for every member of the faculty and staff. Many faculty members are not accustomed to using email and do not check it frequently. Rafael has sent out memos and other information to all of the faculty to instill the habit of checking email regularly into his staff. But email is rarely used to communicate between teachers or in communication from teachers to the Director. Teachers often come to his office rather than sending email to solve a problem. But this wastes lots of time, both of Rafael and of the teacher. Rafael has expressed that this is a major issue for him that if solved would help the faculty use their time more efficiently. Because word of mouth is used primarily rather than email, lots of information is lost in the process or does not reach the final recipient as expected. This is a similar issue with communication with the parents. Parents are not comfortable nor accustomed to using email to communicate so they instead chose to come to the school to speak with Rafael. This usually takes anywhere from 30 minutes to an hour on an issue that could easily and quickly be resolved via email with each parent, thus wasting more of Rafael's time that can be better used elsewhere.

The current means of external communication is the Libreta de Control. This is essentially an agenda given to each student that has to be filled out daily with homework and quiz or test reminders that have to be signed each day by a parent and by a teaching assistant. Through the Libreta de Control, the school aims to be in daily communication with the parents so that they are well informed of their child's schoolwork.

Information Management

Information is managed in a number of ways at Colegio Antonio Raimondi, and this lack of uniformity in itself causes some problems. There is currently a database with all the student and teacher information but, as Rafael has described it, it provides data not information. The data is not organized in a useful manner thus it takes a long time to find and interpret the information you seek. Rafael has developed a program that better organizes student information including grades, an attendance log, monthly payment status, and daily classroom conduct. The program still has a few bugs to be corrected but functions well. If given the time, Rafael will soon complete this project.

II. Family Business Transition

Motivation

As described in Section I, the school was founded by Cecilia Urrutia and Elena Lugon, who also worked as administrators for many years. When Elena Lugon died in December 2009, the school faced a major setback because one of its 2 pillars had fallen. It is becoming very clear that the school must enter a transition period. The school founders, who have been administrators, will not run the school forever.

Cecilia Urrutia still works at the school and makes all major business decisions. It is a very centralized business culture where all lines trace back to Sra. Cecilia. A smooth transition between generations or administrations is vital such that the school can continue to be one of the leading educational institutions in Pucallpa and improve further on its success. This will require detailed planning and communication despite the sensitive nature of the subject. The current management system does not lend itself to an administrative succession of any kind. Fortunately, the Director Rafael shares this opinion and wants to work with TCinGC to work on this transition. The transition is a long process, thus it is important that it begins sooner rather than later.

Outcomes

While in Pucallpa, I completed extensive research in management consulting, specifically dealing with succession planning for a family business such as Colegio Antonio Raimondi. From my research, I will formulate a number of alternatives from which Cecilia, Rafael, and his siblings, who are also owners of the school, may choose. I provided a report compiling all my findings to give to the family as reference.

The presentation was made to the entire family at the Manish Hotel in Pucallpa on July 6, 2012. The ideas and models presented were received very positively and energetically by all family members. A lengthy discussion followed on the current state of the school, what problems it faces today and in the future, what has changed to bring on these problems, what needs to change in order to resolve them, and the possibilities for continued growth and success. In the presentation, I looked more closely into two of the six models presented that I felt would best serve Colegio Antonio Raimondi on the basis of the type of business as well as the size of the business. The family appeared very comfortable and adept at discussing important business issues while remaining sensitive to family issues, a task that is agreed by experts to be one of the most difficult aspects of the succession planning process. The family explicitly expressed interest in the model *Business Succession Plan Model* provided by Community Futures, and together we revisited the major steps and checkpoints. By the end of the meeting, it was concluded that family business succession planning was an important process for the long term success of Colegio Antonio Raimondi that they agreed to begin this semester.

Since Rafael is the only one of his three siblings living in Pucallpa or at all directly involved in the school, the majority of the work in creating the succession plan will fall to him. In order to accommodate for this increased work load, Rafael plans to delegate more directorial responsibilities to the Sub-Director, to allow more time in his schedule to commit too drafting the succession plan in the coming months.

Recommendations

The succession planning process is a time and energy consuming task. Many of the models and documents compiled in Appendices A - H address good practices and tips to help a business owner through the planning process. From these resources, I feel the most important practices are to establish communication protocol early, stay in regular communication with all stakeholders, and revisit what is at stake frequently. Communication will be a challenge because family members live in Lima and Ireland, but tools such as Skype are great for conferences. The sooner the succession planning process begins, the more likely for increased success in the future.

As discussed in the first unofficial family meeting that took place immediately after the presentation, one of the crucial first steps first addressing the organizational changes that are to take place and establishing procedure. Establishing a complete and official organizational chart that includes every position with detailed description is important. More decision making power should be gradually and systematically transferred from Cecilia to Rafael to help transition not only Rafael as the new head of the school but for the faculty and staff.

III. Establish a Web Presence

Motivation

The school does not have a website to communicate with the public. One of the problems facing the school is the relationship with the parents. An informative website with information such as weekly events could significantly improve relations between the school and the parents. Having a website is also key for communicating to a wider public such as potential donors, alumni, and incoming students. Colegio Antonio Raimondi does not currently have a website. This means that there is no established means of communication with the public. Yet the people of Pucallpa are the clients and customers of the school. As one of only three private schools in Pucallpa, Colegio Antonio Raimondi is a leading educational establishment of such caliber that a website is expected. One of the problems facing the school is the relationship with the parents. An informative website with information such as weekly events, teacher profiles, and after school activities could significantly improve relations between the school and the parents. Improving this relationship with parents is important because, as mentioned in Internal and External Communication in Section I, the current breaks in the flow of information is resulting in wasted time of both the parents and the Director Rafael. Parents are not comfortable nor accustomed to using email to communicate so they instead chose to come to the school to speak with Rafael. This usually takes anywhere from 30 minutes to an hour with each parent on an issue that could easily and quickly be resolved via email a question that could be answered by the website, thus wasting more of Rafael's time that can be better used elsewhere. Having a website is also key for communicating to a wider public such as potential donors, alumni, and prospective students.

Outcomes

Colegio Antonio Raimondi already uses Facebook but these sites do not offer the functionality required for a complete K-12 website. They can continue to be used and updated as additional web tools to communicate with the public but use of a content management system is to best to create the site. Rafael and Beybi had already started developing the website with Joomla! but the project has been abandoned due to a lack of time in their schedules once the school year began as well as a lack of an established web management plan. I have since created a new site using the latest version of Joomla! (2.5.6) to make an up-to-date and inviting website. The site has the following 21 pages:

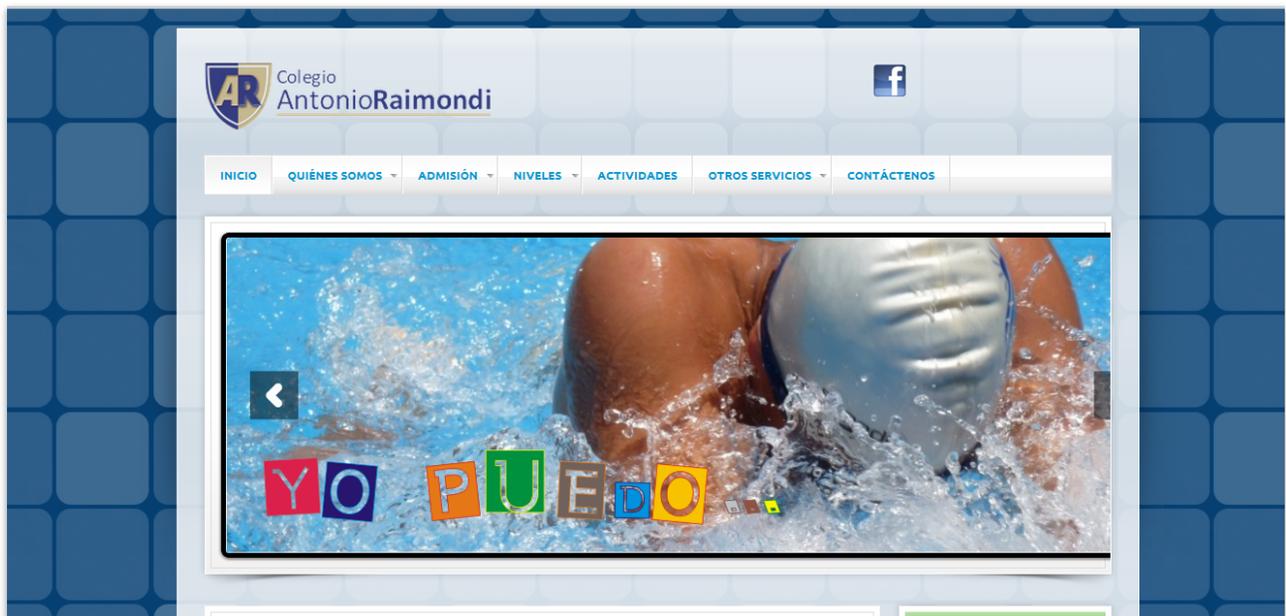
- Inicio (Home)
- Quiénes Somos (About Us)
- Identidad y visión (Identity and Vision)
- Proyecto Educativo (Educational Ideals)
- Historia (History)
- Infraestructura (Infrastructure)
- Conocer Los Maestros (Meet the teachers)
- Admisión (Admission)
- Alumnos Prospectivos (Prospective Students)
- Alumnos Que Regresan (Returning Students)
- Niveles (Levels/Schools)
- Inicial (Initial School)
- Primaria (Primary School)

- Secundaria (Secondary School)
- Actividades (Activities)
- Otros Servicios (Other Services)
- Academia de Natación (Swimming Academy)
- After School
- Boy Scouts
- Deportes (Sports)

Because Spanish is not my first language and I do not know all the ins and outs of the school, I developed a detailed outline for each of the 21 pages. Rafael then took the outline and is working on writing out all the content. I have filled in all the information completed so far as well as any information that I can fill on my own. The shell of the website is completed, meaning that only the final step remains of inserting the content before the website is complete. Once the website is completed and live, quick and simple weekly, monthly, and/or annual updates will be required.

Below are a number of screen shots to give an example of what the website looks like so far.

Inicio (Home Page)



Identidad y visión (Identity and Vision)



Recommendations

To keep the website updated and useful to the public, I recommend the homepage, Inicio, be updated weekly to announce any and all events occurring at the school that week. This would include any regular after school programs as well as any special event or Holiday celebrated at the school. The Returning Students page should be updated monthly or whenever new orders of uniforms or other such things arrive, for example. The Activities (Actividades) and Other Services (Otros Servicios) pages should be updated monthly, mostly to update the photo albums and display the most recent images. Joomla has a very useful way to check for updates that are available, which I would recommend checking weekly. Always keeping the site as up to date as possible makes it easier to maintain.

IV. Additional Recommendations

Establish Network

As described in Section 1, two additional projects that would improve the school are establishing a network and developing software to manage their information more successfully. Rafael would like to set up two networks to be able to manage all the computers on campus.

Any business, particularly a school, needs an efficient system to manage information that is easily input and extracted. By investigating and adopting the best software for this particular school, the flow of information would be much more efficient and accurate. This is a project that can potentially be completed by future TCinGC consultants. Carnegie Mellon has a vast pool of candidates that, if Colegio Antonio Raimondi is interested in continued work with TCinGC, have expertise in this area.

About the Consultant

Hermona Tamrat is a senior in Civil and Environmental Engineering with a minor in Hispanic Studies at Carnegie Mellon University.