

### ***How to Manage the Mountains of Data***

*The amount of data independent schools produce each year can be overwhelming, yet Business Officers want to be able to get to important information quickly. Hear various techniques used to gather and track data over the years, including creating an annual notebook for the Head of important enrollment, financial and faculty salary data, as well as charts that are updated annually that show 5 – 10 years' worth of history on everything from NAIS DASL information to medical insurance rates. See sample schedules that are prepared annually including 14 year financial aid models, cost effectiveness by division, net tuition revenue by grade, dashboards, benchmarking, financial aid analysis, etc.*

### **Learning Objectives:**

Participants will learn how to manage data.

### **Palmer Ball, Palmer Ball Consulting, LLC**

Palmer formed Palmer Ball Consulting, LLC ([www.palmerballconsulting.com](http://www.palmerballconsulting.com)), in January, 2016, as she embarked on a new career as a consultant specializing in project work for independent school financial operations. In addition to her consulting work, during Winter / Spring, 2016, along with NBOA, she was an adjunct faculty member of the independent school finance graduate class at the Klingenstein Institute at Columbia University in New York City. Before starting her consulting career, Palmer served as Business Manager at Spartanburg Day School (Spartanburg, SC) for 21 years, from 1995 to 2016. Prior to that, she was Vice President for Business and Finance at Converse College, her alma mater, for four years, following three years in the College's Development Office. Before joining Converse, she was in the tax department at Price Waterhouse for two years.

Palmer was the recipient of NBOA's prestigious Ken White Award in 2015, served two terms on the NBOA Board of Directors, and was elected to the Association of Business Officers of Independent Schools (ABOIS) in 2008. She served on the faculty of the NBOA Business Officer Institute (BOI) multiple times. She has presented NBOA's long range financial model via deep dives, online classes, webinars, and presentations at a number of national and regional conferences, as well as presentations on data management and long range financial tools and data trustees and heads should have in preparation for strategic plan or accreditation visits, etc.

**Field of Study:** Statistics

**Prerequisites:** Basic knowledge of independent school finances

**Advanced Preparation:** None

**Program Level:** Update

**Delivery Method:** Group Live

**Participants will earn 1 CPE credit.**