

### **Great to Greater: Long-Range Financial Modeling for Independent Schools**

*Learn how to put the National Business Officers Association's NBOA's long-range financial model to use and the strategic questions to ask. The NBOA long-range financial model is an easy-to-use, 10-year budget model that is customized through Excel to best fit individual user needs. Used by hundreds of independent schools, the model generates charts and graphs that you can drop into dashboards or other presentations to create forecasts for tuition, enrollment, FTEs, plant replacement, and more. Review the workings of this model and examine ways to incorporate it into your school's business operations.*

#### **Learning Objectives:**

Participants will learn how to use a long-range financial model tied to data trends, benchmarking, and strategy.

#### **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:** Finance

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

**Advanced Preparation:** None

**Program Level:** Update

**Delivery Method:** Group Live

**Participants will earn 1 CPE credit.**