

## **FCIS Pre-Conference Workshop with ISM**

### **SESSION I: Strategic Financial Planning Workshop**

*One of the most critical functions for Board and leadership teams is the creation and utilization of a Strategic Plan. In this session, we will explore the two types of Strategic Planning and help you choose the best model for your school. Further, we will teach the basic sustainability variables that must be considered by every independent school when creating their Strategic Plan. Moreover, the strategic plan is never complete without a financial plan, and tuition impact estimates. We will also fully explore tuition setting policies so that your Strategic Plan can be fully implemented. Make sure to bring your computer, as Mr. Moore will walk us through how to create a basic financial planning model using Excel, which you will be able to take back to your school.*

### **SESSION II: Financial Aid – Understanding Need**

*Effective Financial Aid Programs begin with a school understanding what financial aid is—and what it is not. In this fast-paced workshop we will begin by defining NEED at your school. This will involve consideration of Financial Aid Policies, Awarding Strategies, and Need Assessment Protocols necessary for effective program management. The goal of this workshop is to demystify need, and to provide effective strategies so that you can be confident in your financial aid decisions.*

### **Terry L. Moore, BCP-E, Executive Consultant, ISM**

Terry Moore has been with ISM since 2002. He recently completed a two and a-half year assignment at St. Mary's School, Aliso Viejo, CA. He served as the Head of Finance, Operations, and Advancement. During that assignment, he continued to consult with ISM. He consults with schools in the areas of:

- Strategic planning/strategic financial planning
- Strategic Performance Analysis (full-school assessment)
- Effective school operations
- Fundraising
- Faculty evaluation and compensation
- Financial aid

He has served more than 200 schools onsite since 2002, many multiple times. He also:

- Leads the annual ISM Business and Operations Academy, which he founded
- Writes for ISM's publications, including Ideas & Perspectives
- Created the ISM FAST program (ISM's cutting-edge financial aid tool)
- Speaks at various conferences including NBOA, NYSAIS, CAIS, FISBO, and AISNE
- Leads ISM Workshops and webinars
  - Leading the Effective Business Office
  - Attracting, Evaluating, Rewarding & Developing Faculty in the 21st Century
  - Financial Aid—Affordability and Accessibility

Terry has over 30 years of experience in both the profit and not-for-profit sectors. His professional background includes expertise in all financial matters of independent schools. Further, he specializes in many aspects of operations, safety and security, marketing, and fundraising. Because of the specialized niche of independent schools, he enjoys helping schools explore their mission statement articulation.

Terry's professional experience includes work at two independent schools. In addition to St. Mary's School, Terry was also at Trinity Academy of Raleigh, NC where he was a founder and served on the Board of Directors for six years, after which he was asked to become the Director of Administrative Services. Additionally, Terry has served on the Board of several non-profits and the Vestry of two Episcopal Churches. He earned a B.S. from East Carolina University, and has done graduate work in finance at Regis University. He has earned the Executive designation through ISM's Business Certification Program. In his spare time he is an accomplished organist.

### **Additional Information**

Participants will earn 6 CPE credits.

Field of Study: Business Management and Organization

Prerequisites: Basic knowledge of independent school finances

Advanced Preparation: None

Program Level: Update

Delivery Method: Group Live