

MEASURING SUCCESS

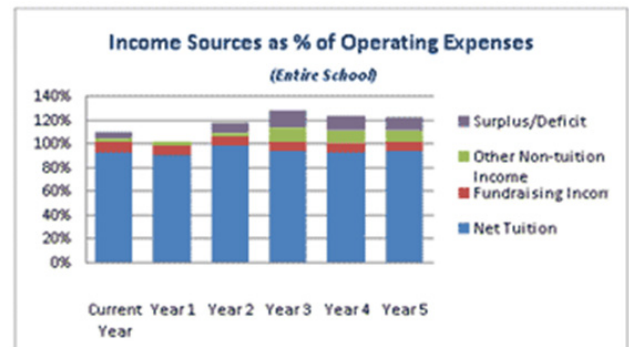
Strategic Financial Modeling Tool

Measuring Success delivers quantitative performance tools and consulting services to help non profit managers and boards measure and enhance their organizational behavior. We deliver results by defining successful outcomes with clients at the outset and delivering recommendations that are actionable relative to the outcomes. We have successfully delivered our products through a combination of consulting services, tools, training, and support to large global institutions, to schools, and to community organizations.

About the SFMT

The Strategic Financial Modeling Tool enables schools to get into a “flight simulator” to test the financial consequences of various inputs, strategies, and financial decisions played out over 5 years. Since finances drive changes in strategy, this tool enables schools to dynamically generate various scenarios of their future finances under various strategies. In the simulator, schools can perform if-then planning in real-time by simultaneously “pulling” on various levers and “pushing” various buttons. The tool allows school leaders to address trade-offs such as:

- Tuitions fees
- Enrollment
- Financial aid awards
- Expenditures
- Fundraising



School leaders can position their schools for stability and growth over multiple years by aligning their vision and mission with a plan for the resources the school can raise and spend.

Why the SFMT is important in tough economic times

Today’s economic times put significant pressures on schools. Some may even be forced to shut down or resize. The SFMT allows schools to model the actions they can take to respond to pressures and the corresponding consequences. Questions the SFMT and Measuring Success consultants can answer:

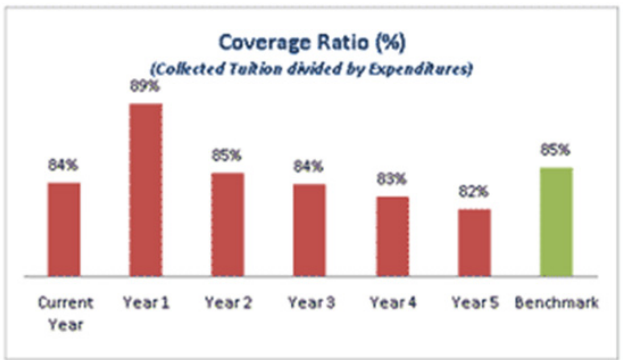
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- What will be the impact of reducing tuition fees?
- What level of enrollment do we need to be viable through the downturn?
- What is the impact of increasing financial aid?
- Where should I invest funds in resource constrained economies?
- What should be the target coverage ratios?

The model is so user friendly and it saves us a tremendous amount of time in our planning process. Instead of our controller spending hours pulling together information for our board meetings, we can just click a button.

– Board Chair
Ramaz School, NY

d. Funds Balances & Net Assets (regardless of accounting status as per		
1. Capital Funds for Facilities, Equipment, Technology		
Expected investment rate of return on these funds		
Start-of-year equipment		
Net Contribution balances (not		
Drawdowns on		
Center on Non		
8. Summary Data - Entire School		
	Current Year	Year 1
A. Budget in Total Dollars (Note: this will only include divisions turned to		
Gross tuition (charged)	\$17,313,400	\$17,081,700
Net tuition	\$15,314,869	\$15,106,980
Financial Aid Awarded	\$1,998,531	\$1,974,720



Benefits of SFMT:

- Simultaneous scenario planning. Experiment with multiple scenarios based on evolving enrollment, tuition, and financial aid to reach your school's goals and be financially sustainable.
- Easy to use charts and tables. Easily communicate operational and strategic goals for board or donor presentation.
- Flexibility. Model adjusts to meet individual school needs.
- Cost allocation by division. See detailed budget information for each school division.

The SFMT package, at \$6,600, includes:

- Strategic Financial Modeling Tool Software
 - An extensive User's Guide to help you input data and develop financial scenarios
 - An online Tool Library to securely upload and download different scenarios
- A three day consultation** by Measuring Success consultants is required for new users. The consultants help users:
- import their existing data into the SFMT
 - practice using the tool to run financial scenarios
 - create scenarios and interpret them

For more information contact us at info@measuring-success.com or call us at 617.475.5001 or 202.684.7024.

Visit our website at <http://www.measuring-success.com>