

MANS&C QUARTERLY

Massachusetts Association of Nonprofit Schools and Colleges

20 Newton St.

Brookline MA

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www.mansac.org

FALL 2010

PRESIDENT'S LETTER

Dear MANS&C members:

I am honored to accept the role of president of MANS&C and pledge to work closely with our board of directors and talented legal counsel, John J. Spillane, in advocating for the interests of nonprofit schools, colleges and universities.

I'd like to welcome our new officers and board members, one of whom has a name that's familiar to many of you. Our new vice president, William J. Conley Jr., is a second-generation officer of MANS&C. His father, William J. Conley Sr., is a former MANS&C board member who served as vice president from 2004 to 2005 and then president from 2005 to 2006.

Please join me in thanking Bruce Amsbary for his dedicated service to MANS&C, most recently as president from 2006 to 2008 and then co-president for the past two years. This coming year, Bruce has kindly agreed to serve as treasurer.

Under his able guidance, MANS&C:

- Successfully opposed countless bills that would have harmed nonprofit schools and colleges, and won passage of many others, such as UPMIFA, that benefit MANS&C members
- Became a repository for our members' Community Impact Statements, which are a vital tool in educating legislators about the contributions our institutions make to their communities
- Kept membership fees level
- Hosted "MANS&C Day at the State House" in 2009, which gave members the opportunity to meet with their state legislators
- Held luncheons that featured Senate President Therese Murray and Lt. Gov. Tim Murray as guest speakers

In my 12 years on the board, it has become clear to me that MANS&C provides significant benefits to our member schools and colleges. But new challenges continue to arise.



In this election year, I encourage you to continue communicating with your state and local legislators. Don't be dissuaded by the new state regulations governing lobbying, which were featured in this year's winter/spring newsletter and are posted on www.mansac.org. You'll also find a link to the names and contact information for your representatives and senators on our site.

Legislators consider our institutions important partners in educating the future leaders (and taxpayers) of Massachusetts. It is crucial that they understand our concerns so we may effectively work together to meet our mutual goals.

PILOT discussions and local fee increases have always been a challenge for us, but they have a new sense of urgency right now due to the struggling economy.

In light of our own institutions' financial difficulties, it is more important than ever for us to educate legislators about the economic and social contributions we make to our communities and the state. We, in turn, will become more effective advocates for our institutions.

In closing, please make note of the dates of our upcoming meetings, which you will find below. The meetings will be held in locations around the state for your convenience and will feature key legislators as speakers. We hope you will join us for these wonderful opportunities.

Best Regards,
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Save These Dates!

Please join us at the following MANS&C board meetings, which will feature legislative leaders as speakers. We will send you more details about the speakers and registration via email as the dates approach.

December 9 – College of the Holy Cross, Worcester

March 3, 2011 (tentative) – Northeastern University, Boston

May 4, 2011 – Annual Meeting, location to be announced

BB&N Budget Sustainability Model Drawing National Attention

In the face of today's fiscal challenges, nonprofit schools are increasingly focused on data-driven financial sustainability as a means of ensuring their long-term success.

The budget model used by Buckingham Brown & Nichols has drawn nationwide interest from schools that are pursuing financial sustainability. The process BBN used to create its budget model was the subject of a workshop at the AISNE Spring Business Conference this year and will be the focus of a session at the National Business Officers Conference next February.

At the AISNE session, BB&N CFO Thom Greenlaw and Controller Jane Segale outlined their budget modeling process and touched on some of the core issues underlying sustainability in nonprofit schools.

BB&N's model, an Excel-based workbook, began as a five-year operating budget and evolved to become a 10-year data repository. Greenlaw calls it "a living, breathing model" that creates a long-term context for discussions and forms the basis for many major decisions.

School officials use the model to develop the school's annual budget and depreciation schedule and to predict campaign cash flows. It is a starting point for the cost study of tuitions versus cost at various grade levels. And it is a tool used in trustee orientation.

Historically, setting tuition has been the final step in the budgeting process. Tuition was determined by the funding needed to support the desired programs, compensation packages and other expenses. Sustainable budget models enable schools to better analyze data on which financial decisions are made and to create "what-if" scenarios that will help them determine the effects of those decisions.

"It's a great repository for information that enables us to look both forward and backward," Greenlaw said of the BB&N model.

"If you make a decision today to spend money, you have to understand what that dollar will mean in 10 years," Segale added. "Modeling allows the trustees to see very quickly the long-term affect of decisions."

Schools that are exploring sustainable modeling must analyze their own particular situation to determine the best course of action, they said. This involves consideration of several questions, including:

- Whether to develop their own or use an off-the-shelf system, such as the NAIS model
- Whether the model should cover 5 or 10 years
- Who should own the completed model and manage the data entry and updates

Noting that Consumer Price Index and the Higher Education Price Index do not capture true cost escalation, Greenlaw and Segale created the BB&N Independent School Price Index. Their research suggests that cost escalation is actually the CPI plus 3.5 percent.

For more information about the BB&N budget model and price index, contact Thom Greenlaw at thom_greenlaw@bbns.org or Jane Segale at jane_segale@bbns.org.

MANS&C Elects New Officers and Board Members

The MANS&C executive board elected a new slate of officers and welcomed several new board members at its Oct. 7 meeting. Officers for the 2010-11 year are:

President – Julaine McInnis, Business Manager, Inly School

Vice President – William J. Conley Jr., Director of Administrative Services, College of the Holy Cross

Secretary – Christine M. Rosell, Chief Financial Officer, Cambridge Friends School

Treasurer – Bruce T. Amsbary, Director of Finance & Operations, the Rivers School

Board members are:

John Alden – Chief Financial Officer, the Berkshire School

Leslie M. Brown – Director of Finance & Operations, Stoneleigh-Burnham School

Robert P. Gittens – Vice President for Public Affairs, Northeastern University

Edward M. King – Vice President for Government & Community Affairs, Boston University

William F. Phinney – Headmaster, Dexter and Southfield Schools

Judi B. Seldin – Chief Financial Officer, Concord Academy

Margaret Striebel – Director of Human Resources, Northfield Mount Hermon School

James R. Tracy – Headmaster, Cushing Academy

Roberta B. Whiting – Chief Financial Officer, Shore Country Day School

REMINDER

According to state law, all heads of schools with grades 1 through 12 must report unauthorized fires in buildings or on school grounds to the local fire marshal within 24 hours. The report must be filed regardless of the extent of the fire or whether the fire department responded.

Reports must be submitted on form FP-200. For more information, go to <http://www.mass.gov/Eeops/docs/dfs/osfm/forms/fp200.pdf>.

Good Neighbors

Inly School Makes Major Economic, Social Contributions to the Community

Inly School's commitment to community service is tied to a belief that children should be inspired and nurtured to become global citizens.

The school has an enrollment of just 272 students, from toddlers through eighth grade, but it provides major economic and social benefits to Scituate and the surrounding area.

Last year, Inly boosted the local economy by more than \$1.2 million, according to Inly officials. That figure includes salaries for Scituate residents who are fulltime employees, fees paid to local consultants and contractors, and business provided to local catering services and restaurants.

Over the past two years, the school also spent \$65,000 locally in capital expenditures. And by enrolling 42 local students, Inly saved Scituate \$315,000 in educational expenses.

The school also loans its Arts Barn for performances by community groups, including the Atlantic Symphony Orchestra and the Broad Cove Chorale.

Inly is currently working with the town Highway Department to adopt a garden that the sixth-graders will maintain.

Beyond the school's economic impact, Inly has a long list of community service projects that provide far-reaching benefits to organizations and individuals in Scituate and nearby towns. Many of the ideas for the projects come directly from the students.

"The enthusiasm for Inly's community service initiatives has been growing in leaps and bounds in the last few years," Head of School Donna Milani Luther said. "We look forward to this momentum carrying us into new collaboration with many local and global organizations."

At the heart of the effort is the ongoing work of two after-school groups – Inly's Community Service Club and Girls with a Cause – as well as community service projects initiated by the Parents Group and held annually on Veterans' Day and Presidents' Day.

Those two days, when school is not in session, are set aside for family service at school and in the community. Middle School



students also have a 20-hour community service commitment that they fulfill on their own time.

The Community Service Club, an after-school organization for students in grades 4 to 8, has organized a variety of school-wide projects. These include Earth Day activities, a Martin Luther King Jr. values project, and emergency relief projects for international disasters such as Hurricane Katrina and the earthquake in Haiti.

At various times of the year, Inly students:

- Conducted a backpack drive for local families and collected toiletries for shelters
- Helped out with Scituate Community Christmas for families in need
- Collected donations for the Scituate Food Pantry
- Volunteered at a local animal shelter
- Made cards for veterans and homeless children
- Sang at a local assisted living center
- Held collection drives for Cradles to Crayons and Coats for Kids, and much more

As part of an ongoing project with the Scituate Senior Citizens Center, Inly students adopted elders and then wrote biographies of them.

At a local shelter for abused women and children, students do yard work and paint, working alongside their parents. They also tutor there throughout the year.

Inly School Annual Economic Impact to the Town of Scituate - 2009

Local students (K-8)	\$315,000
Full-time jobs to Scituate residents	\$650,000
School admin/education consultants	\$53,970
Local contractors (annual maintenance)	\$9,736
Local contractors (improvement projects)	\$70,000
Local consultants (building & grounds)	\$10,000
Capital project expenditures (past 2 years)	\$65,000
Catering services, local businesses	\$14,000
Staff/faculty eating out	\$14,250
Middle School pizza fundraiser	\$8,000
Grand Total	\$1,209,956

MANS&C

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20 Newton St.
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The mission of MANS&C is to monitor and respond to legislative and regulatory activity by the Commonwealth that has a direct impact on the welfare of our membership.

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