Plan, Evaluate, and Position Your School to Fund Your Campus Master Plan

Who: Heads of School, Development Directors, CFOs,
Business Managers, and Board Chairs
Presenter: Chad Christoff
When: Wednesday, September 16th from 10:00 a.m. to 11:00 a.m.
Where: Virtual on Zoom

Session Description:

Many schools maintain a campus master plan; however, when developing that master plan, few schools put in the effort to set clear parameters for how they will fund it. In this session, Stifel will share case studies and strategies – specifically key financial performance metrics and modeling techniques – to evaluate and prepare your school to fund its campus master plan. This session will explore the pros, cons, risks, and tradeoffs of various scenarios that weigh the use of fundraising, institutional reserves, and debt financing to best position your school for long-term sustainability. While focused on capital, a prudent plan includes a deep dive, long-range view of key operating assumptions, revenue diversity, and proactive identification of downside "levers." Intended takeaways from this session include (a) understanding the financial metrics required to position your school with multiple funding options, (b) developing a process for evaluating various scenarios that allows for shifts, pivots, and dynamic variable testing, and (c) reviewing case studies and real-world examples from independent schools in Colorado and across the country.

About Chad Christoff:

Chad Christoff is a managing director in Stifel's Independent School Finance Practice. Mr. Christoff specializes in financing transactions for independent school borrowers across the country. He has spent over 15 years working with independent schools to prepare for, evaluate, and execute tax-exempt debt financings and explore the prudent use of debt financing. These financings include both bank-based and public market structures, fixed and variable rate debt, and the use of interest rate swaps and other derivatives. Mr. Christoff has served as the primary point of contact, provided analytical support, and managed transactions for independent schools ranging from "AAA" rated institutions such as Phillips Exeter Academy (NH) to start-up schools doing their first ever financing. In Colorado, Mr. Christoff has served Kent Denver School, Colorado Academy, Boulder Country Day School, Fountain Valley School, Vail Mountain School, Watershed School, Montessori Academy of Colorado, and Montessori School of Denver. Mr. Christoff has presented at conferences including NBOA Annual Meeting, NBOA Business Officer Institute, Cal-ISBOA Annual Conference, and NYSAIS Annual Conference. Mr. Christoff holds a B.A. in Economics from Grinnell College and is a native of Donahue, Iowa. He serves as a member of the Finance Committee at Watershed School in Boulder, Colorado.

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