



Full Schedule

Wednesday, October 2

9:00 - 9:30 **One-Day Workshop Registration**

9:30 - 2:30 **One-Day Workshop** *(separate registration)*

Relationships: Your School's Most Valuable Asset

Scott Barron | Founder and CEO, School Growth, Inc.

3:00 - 5:00 **Conference Registration**

4:30 - 5:00 **First-Time Attendee Welcome**

4:30 - 5:00 **Sponsor Meeting** *(Sponsors Only)*

5:00 - 6:00 **Welcome Reception**

Thursday, October 3

7:00 - 7:45 **Sunrise Stretch and Hike** *(on your own)*

8:00 - 5:00 **Exhibit Hall Open**

8:00 - 9:00 **Breakfast**

9:00 - 10:15 **Keynote Session**

The Workplace of Tomorrow: The Rise of the Social Enterprise

Donna Orem | President, NAIS

The world is changing in ways that will not just tweak the workplace experience but rather transform it entirely. School leaders will need to enact both short- and long-term strategies today to ensure they are able to recruit and retain a workforce for the long run. Disruptors like smart machines, the gig economy, and an increasingly mobile workforce will offer new opportunity to rethink what a school's workforce could look like in the future, while a declining talent market, increased costs of living, and disillusionment with teaching will challenge schools in the short run. We'll look at the disruptors, both today and over the next decade, and lay out a plan of action for long-term success. Finally, we will discuss why forecasters believe the successful workplace of the not-too-distant future – that is, those that are most likely to attract top talent – will be social enterprises, where relationships, collaboration, and transparency are prized above all else.

10:15 - 10:45 **Break with Sponsors**



10:45 - 11:45 Breakout Sessions

Financially Attainable Master Plans: An Innovative Approach to Implementation

Brett Fuhrman | Chief Financial Officer, Carolina Day School

Are you overwhelmed with the high price tag to complete your master plan? Are your trustees "stuck" because they can't decide which facilities project to pursue? This session outlines an innovative approach to realizing your campus master plan. You will learn how to shift your trustees' mindset to an approach that is more affordable, dynamic, and nimble; one that better aligns with and supports the innovation taking place within teaching and learning today. This generates momentum that leads to a quicker path to completion of your master plan – a path that also tends to be more cost effective and financially achievable.

People Matter Most - The Economics of Employing and Retaining Great Talent

Steve Mandell | Principal Consultant and Advocate, Big Back Pack, LLC

Larry Pittman | Chief Financial Officer, Carrollwood Day School

The economics of independent school education is tied most directly to the recruiting, hiring, and retention of your faculty and staff. With teacher turnover at an all-time high, there has never been a more critical time for independent schools to focus on the development of their workforce in creative and dynamic ways. How does your school best represent its employment brand and employee value proposition during the hiring process? Do you have a corporate social responsibility program and statement that will energize this next generation? How do you invest in the continued growth and development of your faculty and staff? These are critical elements in building a competitive edge in human capital, and failure to do so inhibits your ability to recruit, hire, and retain quality teachers. Join this current school CFO and former HOS/current consultant in an interactive workshop, which will share templates and strategies addressing these important trends in workforce development. Participants will leave the session with a roadmap in hand to address these topics back at home.

Successful Auxiliary Programs for Revenue and Programming Goals

Jim Hilleary | Director of g360, The Galloway School

Veronique Kessler | Chief Financial Officer, The Galloway School

The Galloway School's CFO and Director of Auxiliary Programs will lead participants through their school's auxiliary programs and show how they meet programming and revenue goals. This presentation will be interactive and include activities for participants to examine their own school's resources that can be used for auxiliary programs.

11:45 - 12:30 Lunch

12:30 - 1:30 General Session

Sourcing Solutions

Attendees will take part in four roundtable mini-sessions with MISBO Consortium Partners, whose offerings are one of your greatest resources! Get the latest information from partners new to you or from those you already know. Find your table assignments in your name badge – the first three mini-sessions are assigned, and the last is a free for all!

1:30 - 2:00 Break with Sponsors



2:00 - 3:00

Breakout Sessions

Cyber Liability and Who Is at Risk

Lisa Dickinson | Senior VP Executive Liability Practice, Marsh & McLennan Agency

When it comes to protecting valuable personal information of both students and employees, it would seem obvious that cybersecurity should be paramount to most school administrators. However, after many recent high-profile incidents, it's clear that even the most secure networks and sophisticated institutions are vulnerable to data breaches. What often goes unconsidered is who is held responsible for these breaches and the subsequent financial implications companies and institutions can face. Our goal is to educate school administrators on why it's not just Fortune 500 companies and online retailers who are facing cyber risks on a daily basis and what those threats could mean to their balance sheet.

Listen! Your Financials Are Trying to Tell You Something!

David Adams | Senior Vice President, George K. Baum & Company

Charles Maumus | Assistant Head of School for Finance and Operations, Harding Academy

At the end of every year, your organization engages a professional to summarize how you performed for the year – or at least you should! Your (audited) financials relay to your leadership just how you did, given certain industry practices and guidelines. More importantly, it relays to your external constituents – trustees, alumni, grantors, donors, and lenders – how you stack up. Do you know what these financials are telling you, based on how they compare to the rest of the industry? This session explores fundamentals associated with financial performance and how your story is defined through them. We will look at a recent financial recovery case study, where industry metrics were used to educate leaders across the organization on strategic operating moves designed to position the school for long-term success. Join us to see how your story can be informed by another institution's challenges!

The Practical and Legal Dos and Don'ts When Implementing a New Faculty Compensation Plan

Jennifer Sandberg | Partner, Fisher Phillips

Many schools are facing compensation challenges, from needing to cut compensation to trying to find ways to foster and reward conduct consistent with their missions. Changing long-standing compensation is very challenging, especially within close-knit school communities. This session will address questions to consider when developing a new compensation program, including how to value tenure as well as expertise, how to bring on new, needed talent that may require higher pay, and how to motivate faculty to do their best work without asking for a stipend for every new task. At the same time, compensation is a legal minefield and it is easy for schools to get tripped up if they do not consider the legal ramifications of their changes. These legal hurdles can include tax issues relating to certain types of non-monetary compensation and the rising claims we are seeing under the Equal Pay Act and other claims of discrimination.

3:00 - 3:30

Break with Sponsors



3:30 - 4:30

General Session

Instability Markers: Signposts on the Road to Ruin

Jim Christopher, M.Ed, EdD | Head of School, Kenneth Gordon Maplewood School

Business officers and heads of school have powerful school performance data at their disposal, and yet boards and school leaders often ignore it to their peril. Cherry-picking data points to boost a school's image rather than scrutinizing data to measure sustainability can often lead to disaster. This workshop examines the key instability markers that boards and heads should be tracking in order to ensure the ongoing sustainability of their schools. Participants will examine key indicators of admissions, staffing, financial stability, and program leadership and leave with an understanding of how to track trends in their own schools.

4:45 - 6:00

Beer Tasting Event *(ticketed event)*

Russ Webb

Sponsored by FACTS, SunTrust, & Voluntary Benefits at Work

Join us for an evening of beer right in the hotel! Asheville is known as Beer City - get a taste of how true that is. Ticket includes 6 blind beer tastings, a history of beer in Asheville and around the world, and other fun surprises.

Friday, October 4

7:00 - 7:45

Sunrise Stretch and Hike *(on your own)*

8:00 - 9:00

Breakfast & State of the Association

Please be seated by 8:30 for the presentation

9:00 - 10:00

General Session

Two Economists Discuss the Market for Education

Benjamin Scafidi | Director of the Education Economics Center, Kennesaw State University

Roger Tutterow | Henssler Financial Endowed Chair, Director of the Econometric Center, and Professor of Economics, Kennesaw State University

Increasingly, policy debates on education are incorporating economic insights on "how markets work." In this session, two market-oriented economists discuss the most important implications of the economic environment for primary and secondary education. Topics include how school choice programs broaden competition in the market for education, human capital as a source of comparative advantage, tuition discounting as price discrimination, the role of ancillary activities as both product differentiators and as parallel revenue sources, and the importance of endowments in educational finance.

10:00 - 10:15 **Break**



10:15 - 11:15

Breakout Sessions

Getting In Sync: Policies, Protocols, Contracts, & More

Matthew Batastini | Co-Managing Partner, Schwartz Hannum PC

Join us for this comprehensive session which will describe a cohesive approach to synchronizing independent schools' faculty handbooks, student handbooks, athletics handbooks, faculty offers and agreements, job descriptions and applications, enrollment agreements, acceptable use policies, homestay guidelines, health center protocols, and other key documents – including school websites!

Personalized, Meaningful, and Relevant: Today's Benefits Package

Jamie Greenleaf | Lead Advisor, Principal, Cafaro Greenleaf/Carroll Consultants

Employers get the most out of their benefit programs by focusing expenditures on the programs employees value most, having a positive effect on recruiting and retention. Customizing packages to the employee can actually cost you less! Stop building benefits for the masses, and start optimizing your spend to build a better benefit package.

11:15 - 11:30 **Break**

11:30 - 12:30

Breakout Sessions

The Dangers that Lurk Before and After the Bell Rings

Jennifer Sandberg | Partner, Fisher Phillips

Independent schools spend a great deal of time and money on risk management and attempting to minimize their risk of legal liability while school is in session. However, many times the biggest dangers and areas of potential liability occur before and after the school bell rings. Most independent schools cater to their community needs by offering before and after school care programs and various summer camp options. Many also allow community vendors on campus after hours and rent out their facilities. Unfortunately, if not managed well, the cost of these added functions is additional exposure and potential legal liability.

Retirement Plans: Identifying and Minimizing Outside Risks

Suzanne Spunzo | Director, Client Development & Advocacy, New Pinnacle Consulting Group, LLC

In this presentation, we will examine how the outside environment impacts your school's retirement plan, including regulatory, litigative, political, and competitive environments. We will also discuss the risks that are within a plan sponsor's control and how to prepare for them as much as possible. We will review retirement plan compliance from basic requirements to implementing procedures and utilizing resources in a proactive manner. While ERISA plans may appear to receive the most scrutiny from regulators and participants, nonERISA plans should be prepared as well. Join us for an interactive discussion on which plan risks you can control now and best practices to minimize risks outside your control.

12:30 - 1:00 **Grab & Go Lunch**