



WORKSHOP FOR NEW BUSINESS OFFICERS

JUNE 11-13, 2019 | ATLANTA, GA

Full Schedule

Tuesday, June 11

Holiday Inn & Suites Atlanta Airport-North

5:00 - 6:00 PM *Registration & Welcome Reception*

6:00 - 8:00 PM **Dinner & Opening Program**

Political Skills and The Egg

Wednesday, June 12

Woodward Academy

8:30 - 8:45 AM *Bus to Woodward Academy*

8:30 - 9:00 AM *Registration and Welcome*

9:00 - 10:00 AM **Welcome To School - Mr. Toad's Wild Ride**

This session offers an overview of the role of the business officer in an independent school with a big picture view of your role and responsibilities. From your partnership with the head of school to the complexities of your job to understanding the culture and various constituencies, the business officer has a challenging and rewarding position within the school. We will explore the specific areas of responsibilities as well as suggestions for the important things to concentrate on during your first year.

Louise Hodapp, Director of Finance, The Schenck School



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Wednesday, June 12

Woodward Academy

10:00 - 10:15 AM

Break

10:15 - 11:15 AM

Communication and Compliance and Complexities - Oh My!

During this interactive session, you will learn about the many facets of human resources in independent schools. Topics will include the yearly cycle of HR responsibilities, the importance of documentation and communication, best practices relating to the Affordable Care Act and Fair Labor Standards Act, your 403(b) fiduciary responsibilities, and information on where you can obtain help and resources to manage your HR responsibilities. You will leave this session with an understanding of the important role HR plays in your success as a new business officer and how you will successfully fulfill that role.

Amy Madsen, Human Resources Manager, Charlotte Country Day School

11:15 - 11:30 AM

Phone A Friend: MISBO Networking

Michelle Shea, Associate Executive Director, MISBO

11:30 - 11:45 AM

Break

11:45 - 12:45 PM

Financial Data Literacy - The Sharpest Tool in Your Shed

With so many tools available these days, it is hard to figure out which ones make the best sense for you, your school, and your board to keep front and center. We will explore several including benchmarking tools, financial planning tools for revenues and expenses, and admissions funnel tools. These tools are designed to keep you focused on what matters most and fully aware of the heat maps where trouble might be lurking.

Damian Kavanagh, Executive Director, MISBO

12:45 - 1:30 PM

Lunch

1:30 - 2:30 PM

Risk, Monopoly, or Sorry - Which Game Will You Play?

This session is designed to encourage in-depth discussions regarding risk awareness in independent schools. How to define risk in your institution is an important factor to determine appropriate mitigation measures. Understanding the known, yet planning for the unknown: What circumstances could possibly arise that would prevent you from attaining your goals? What is your risk tolerance? What is your risk appetite? What is the difference between the two? What are the common risks for all independent schools and how do these relate to your school? Let's talk about risk and the larger picture.

Robert Shea, Principal, Banyan Risk Management Consulting



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Wednesday, June 12

Woodward Academy

2:30 - 2:45 PM

What You Need to Know Yesterday, Today, and Tomorrow: MISBO Professional Development

Dianne Sagaas, Director of Professional Development, MISBO

2:45 - 3:00 PM

Break

3:00 - 4:00 PM

Follow The White Rabbit - The Tech-Finance Matrix

The use of technology has become an integral part of the landscape in education. In this session, we will discuss technology in independent schools from the perspective of the business officer's desk. What are the trends you should be aware of? What are some of the key questions you should be asking? How can you provide the best support to your IT team? What about cybersecurity? Join us as we discuss these issues with a seasoned former director of IT.

Lee Connor, Vice President for Operations & Auxiliary Services, Woodward Academy

4:00 - 5:00 PM

The Woodward Parade (Really, just a tour!)

Lee Connor, Vice President for Operations & Auxiliary Services, Woodward Academy

5:00 - 5:15 PM

Bus to Hotel

5:30 - 6:30 PM

Informal Happy Hour at the Hotel Bar followed by Dinner

Thursday, June 13

Woodward Academy

8:30 - 8:45 AM

Bus to Woodward Academy



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Thursday, June 13

Woodward Academy

9:00 - 10:00 AM

Front-Loading Your Legal Efforts

Whether new to the role or the world of independent schools, new business officers must confront both recent and long-term issues from new perspectives, ever-mindful of potential legal exposure and resulting runaway costs. This session will discuss ways to front-load efforts with the goal of reducing the occurrence, severity, and cost of legal disputes, lawsuits, and administrative claims, as well as related damage to the reputations and sense of community that distinguish independent schools and draw the families we serve. Topics will include making high return investments in areas such as training and communications, avoiding the common mistake of choosing short-run savings with unexpected long-term costs, and assessing and incorporating “free” resources appropriately.

Heather Broadwater, Partner, Potomac Law Group, LLC

10:00 - 10:15 AM

Break

10:15 - 10:30 AM

Does Your School Purchase, Buy or Shop: The MISBO Purchasing Consortium

Jay Danielson, Director of the Purchasing Consortium, MISBO

10:30 - 11:30 AM

Governance: Staying In Your Lane

Of all the things you have been trained to do and are prepared for, governance probably is not one of them and yet it is one of the most significant parts of your job. You will be called on to make regular reports and to support your head of school in his or her relationship with the board. The more you understand how governance is *supposed* to function, the better prepared you will be to spot trouble coming from a mile away. You will learn both the inviolable tenets of governance and also the squishy points that have multiple interpretations (some of them even good!).

Damian Kavanagh, Executive Director, MISBO

11:45 am - 12:15 PM

Wrap Up / Grab & Go Lunch

12:15 PM

Transportation Provided to Hotel & Airport

Best to book flights departing after 2:30 PM