



Program Book & Learning Journal

Agenda



Tuesday, June 16

- 3:00 pm – 3:30 pm
- 3:30 pm – 3:31 pm
- 3:31 pm – 4:00 pm
- 4:00 pm – 4:10 pm
- 4:10 pm – 4:40 pm
- 4:40 pm – 4:50 pm
- 4:50 pm – 5:30 pm

Welcome

Damian Kavanagh, Executive Director, MISBO

Stand & Stretch (see last page)

Role of the Business Officer

Julie Ray, Chief Financial Officer, Mount Paran Christian School

Break

Legal: Contracts and Employment

Jennifer Sandberg, Partner, Fisher Phillips

Break

Wine and Wisdom

Wednesday, June 17

- 3:00 pm – 3:10 pm
- 3:10 pm – 3:40 pm
- 3:40 pm – 3:41 pm
- 3:41 pm – 4:10 pm
- 4:10 pm – 4:20 pm
- 4:20 pm – 4:50 pm
- 4:50 pm – 5:00 pm
- 5:00 pm – 5:30 pm

Welcome

Accounting and Audit

Deborah Anderson, Chief Operating Officer, Foxcroft School

Stand & Stretch (see last page)

Endowment

Deborah Anderson, Chief Operating Officer, Foxcroft School

Break

Auxiliary Programs

Damian Kavanagh, Executive Director, MISBO

Break

Wine and Wisdom

Thursday, June 18

- 3:00 pm – 3:10 pm
- 3:10 pm – 3:40 pm
- 3:40 pm – 3:41 pm
- 3:41 pm – 4:10 pm
- 4:10 pm – 4:20 pm
- 4:20 pm – 4:50 pm
- 4:50 pm – 5:00 pm
- 5:00 pm – 5:30 pm

Welcome

Payroll and HR

Stephanie Cantillo, HR Manager, St. Martin's Episcopal School

Stand & Stretch (see last page)

Technology and Physical Plant

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

Break

Risk Management

Deborah Anderson, Chief Operating Officer, Foxcroft School

Break

Wine and Wisdom

Friday, June 19

- 3:00 pm – 3:10 pm
- 3:10 pm – 4:10 pm
- 4:10 pm – 4:30 pm

Welcome

The Secrets of Influence: Leadership and Governance

Damian Kavanagh, Executive Director, MISBO

Erin Meadows, Founder and CEO, Cause Collaboration, LLC

Wrap Up

Sessions & Notes

Tuesday, June 16

Welcome | 3:00 – 3:30 pm

Damian Kavanagh



Notes / Questions:

Points to Remember:

Role of the Business Officer | 3:31 – 4:00 pm

Julie Ray



Notes / Questions:

Points to Remember:

Sessions & Notes

Wednesday, June 17

Accounting and Audit | 3:10 pm – 3:40 pm

Deborah Anderson



Notes / Questions:

Points to Remember:

Endowment | 3:41 pm – 4:10 pm

Deborah Anderson



Notes / Questions:

Points to Remember:

Sessions & Notes

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Lee Conner



Notes / Questions:

Points to Remember:

Sessions & Notes

Friday, June 19

The Secrets of Influence: Leadership and Governance
3:10 pm – 4:10 pm

Damian Kavanagh



Notes / Questions:

Erin Meadows



Points to Remember:

Additional Notes



Continue making connections and expand your network at the **2020 MISBO Annual Conference!**

Use code **wnb20** to receive a 20% discount on your registration

Faculty



Deborah Anderson

Chief Operating Officer, Foxcroft School
deborah.anderson@foxcroft.org

Deborah joined Foxcroft School in June 2009 and serves as the Chief Operating Officer. She attended an independent high school and studied at Texas Women's College, graduating cum laude with a B.S. in mathematics. After spending some years in corporate America, most of Deborah's 28+ years of work experience have been in non-profit residential communities, specifically boarding schools and continuing care retirement communities (CCRCs). For the past 10 years she has worked at independent schools, including Episcopal High School, Oldfields School, and now Foxcroft School.



Stephanie Cantillo

Human Resources Manager, St. Martin's Episcopal School
scantillo@stmartinschool.org

Stephanie has led the human resources department at St. Martin's Episcopal School for the past five years. She is a collaborative and solutions-focused HR leader with 14 years of experience in hospitality, education, and nonprofit, and she currently serves as the Chair of Member Orientation for SHRM-Atlanta. Stephanie earned her BS degree in multinational business operations with a double major in hospitality administration from Florida State University. She was born in Colombia, South America, grew up in New England, and has lived in Atlanta since 2006. She enjoys spending time with her family, dancing, and being in nature.



Lee Conner

Vice President for Operations & Auxiliary Services, Woodward Academy
lee.conner@woodward.edu

Lee has been at Woodward Academy since 2004 and currently serves as the Vice President of Operations. He is responsible for leading all operations and support services for the school, including a robust student transportation service, summer programs, facilities, dining services, and retail operations. Lee has an undergraduate degree in decision sciences, an MBA from Clemson University, and retired at the rank of Major from the Air Force Reserve.



Damian Kavanagh, Ed.S, CAE

Executive Director, MISBO
damiankavanagh@misbo.com

Since July 2017, Damian Kavanagh has served as executive director of MISBO. Damian has over 20 years of independent school industry experience. Prior to MISBO, he spent seven years as a vice president with SAIS where he oversaw the accreditation and membership programs of the association. Prior to joining SAIS, he spent 15 years as a teacher, coach, and administrator at The Westminster Schools of Atlanta, GA. From there, he served as head of school of Cambridge Academy in Greenwood, SC. Kavanagh earned both his BA and MA in Latin literature from the University of Georgia, a specialist degree in education (educational leadership for learning) from Kennesaw State University, and the Certified Association Executive designation from the American Society of Association Executives.

Faculty



Erin Meadows, CPC, IOM, ELI-MP

Founder and CEO, Cause Collaboration, LLC
emeadows@causecollaboration.com

Erin is a certified professional coach, speaker, and leadership consultant who passionately believes high-performing organizations have engaged teams who fully understand – and are invested in – the organization’s mission, vision, values, and strategy. Erin founded Cause Collaboration, where she spends her days helping organizations and the people in them align their business strategies, communication, and culture with their missions and visions. As a coach, Erin has a unique ability to help others tap into their thinking, beliefs, and motivations in order to create goals and action plans that allow them to move toward success in all areas of their lives, careers, and organizations. Erin’s absolute favorite parts of coaching are witnessing people, teams, and organizations experience their “ah-ha” moments and helping them achieve things they once thought weren’t possible. When Erin isn’t working, you can find her spending time with her husband, Chris, and their 15-year-old Japanese Chin, Murphy.



Julie Ray

Chief Financial Officer, Mount Paran Christian School
jray@mtparanschool.com

Julie is the Chief Financial Officer for Mount Paran Christian School in Kennesaw, Georgia. She received her bachelor's degree in liberal arts from the University of Texas at Austin and received her master's degree in business administration from George Mason University with a focus in management and interest in organizational design and development. Julie worked in the international data communications industry for eight years with British Telecom, MCI, and Equant prior to joining Mount Paran Christian School in 2003.



Jennifer Sandberg

Partner, Fisher Phillips
jsandberg@laborlawyers.com

Jennifer Sandberg is a partner in Fisher Phillips’ Atlanta office. Employers, in-house counsel, and human resources professionals view her as a trusted advisor providing solid business advice. Jennifer delivers engaging and highly effective training for senior executives and managers on a diverse array of labor and employment topics. She conducts legal compliance audits of human resource functions, procedures, and policies, provides a triaged approach to audit findings, and she prepares employee handbooks and policies for employers that are succinct and easy for employees to understand. She frequently speaks on topics related to all areas of employment law such as hiring and firing workers, disability accommodations, employee leaves, workplace investigations, and wage-hour issues. Jennifer was selected for inclusion in The Legal 500 – Workplace & Employment Counseling in 2015.



Presentations will be archived on misbo.com and the link will be shared with attendees

CPE Information

Attendees must attend sessions and complete the workshop survey to receive CPE credits

Welcome

Learning Objective: Attendees will determine their knowledge level through a series of activities.

Field of Study: Personal Development

Role of the Business Officer

Learning Objective: Attendees will be introduced to a business officer's specific areas of responsibility, as well as how to manage the internal and external relationships and challenges faced daily.

Field of Study: Personal Development

Legal: Contracts and Employment

Learning Objective: Attendees will review a variety of contracts and agreements including compensation, employment, and enrollment.

Field of Study: Business Law

Accounting and Audit

Learning Objective: Attendees will be able to identify different areas of responsibility, including: annual budget; cash reserve and debt management; and preparing financial statements.

Field of Study: Finance

Endowment

Learning Objective: Attendees will review the various types of endowment, their purpose, and the roles included in management. Also covered will be policy statement objectives, portfolio composition, and endowment accounting.

Field of Study: Finance

Auxiliary Programs

Learning Objective: Attendees will explore the various components of auxiliary services and be introduced to tools that will enable them to strategically assess the management of their programs. This will include strategic goals, asset inventory, and capacity analysis.

Field of Study: Personal Development

Payroll and HR

Learning Objective: Attendees will review and discuss the function of human resources in an independent school, including payroll, job descriptions, employee handbooks, and more.

Field of Study: Personnel/Human Resources

Technology and Physical Plant

Learning Objective: Attendees will be introduced to their role in managing cyber security and the components of running a physical plant.

Field of Study: Information Technology

Risk Management

Learning Objective: Attendees will review and discuss the basic areas of risk management, including employee practices, insurance policies, student programs, security, compliance, and communication during an emergency.

Field of Study: Management Services

Governance and Your Relationship with the Board

Learning Objective: Attendees will review the role of the business officer and the board along with their respective duties - including fiduciary, compliance with duty of care, confidentiality, and more - along with best practices in meeting policies and procedures.

Field of Study: Personal Development

In accordance with the standards of the National Registry of CPE Sponsors, CPE credits have been granted based on a 50-minute hour. For more information regarding administrative policies such as complaint, refund, and cancellation, call Dianne Sagaas at the MISBO office at 404-921-3812.



MISBO is registered with the National Association of State Boards of Accountancy (NASBA) as a sponsor of continuing professional education on the National Registry of CPE Sponsors. State boards of accountancy have final authority on the acceptance of individual courses for CPE credit. Complaints regarding registered sponsors may be submitted to the National Registry of CPE Sponsors through its website: www.nasbaregistry.org

Stand & Stretch

Human Basketball Net

Raise your arms straight above your head.
Interlace your fingers.
Alternate palms downward and upward.
Stretch and breathe.
Stretch your arms out in front and relax your shoulders.



Neck Rolls

Drop your head to one side.
Roll it around in a wide circle; switch directions.
Slowly find the tight spots.
Hold and breathe, letting your breath release the tightness.
Extra stretch: Place a hand on your head and gently pull to the side.



Kick Back Log-on Pose

Interlace your fingers behind your head.
Relax your elbows and shoulders.
Smile, breathe, and stretch your elbows back.
Let the tightness release slowly.

Repeat throughout the day.



Arm Pulls

Place left arm behind your back.
Grab your wrist with your right hand.
Drop your head to the right side.
Roll head slightly and explore any tightness.
Stretch and breathe.
Repeat with other arm.

Bend left arm above and behind your head.
Grab your elbow with your right hand and stretch up.
Breathe and let shoulders relax.
Repeat with other arm.

