

2021 MISBO ANNUAL CONFERENCE

ONE STEP BEYOND

October 27-29, 2021 | Chattanooga, TN

MISBO
EVENTS



Full Schedule

Wednesday, October 27

10:00 – 2:30 **Pre-Conference Workshop** | *Separate Registration* – Junior Ballroom

The Anatomy of Happy, High-Functioning Teams

Teams come in all different shapes and sizes, with different goals and unique ways of getting the job done. While teams are as varied, complex, and unique as the people on them, they often face similar challenges and opportunities. In “The Anatomy of Happy, High-Functioning Teams,” we will discuss 4 key areas the most successful teams excel in: relationship building, collaboration, emotional intelligence, and communication. No matter the size, make up, and unique challenges of your team, this workshop will give you insights, tools, and prompts to help you contribute to your team in more meaningful, high-functioning ways.

Attendees should leave this session with:

- An understanding of how to connect through trust
- A simple format for better collaboration
- A skill to improve intuitive listening abilities
- Prompts for crucial conversations
- An understanding of their personal core values and how those show up in life and work
- A 7-day personal plan to make a positive impact on their team

❖ **Erin Meadows**

CEO, Cause Collaboration

3:00 – 5:00 **Registration Open** – Lobby

4:45 – 5:00 **New Attendee Welcome** – Junior Ballroom

5:00 – 6:30 **Opening Reception** – Junior Ballroom

Thursday, October 28

7:45 – 3:30 **Exhibit Hall Open** – Portman Pre-Function & River Room

7:45 – 8:30 **Buffet Breakfast** – Portman Ballroom A/B

8:30 – 9:00 **Chair’s Welcome** – Portman Ballroom A/B

9:00 – 10:00 **Keynote Session** – Portman Ballroom A/B

Spark Transformational Leaders

Business change is happening at the speed of light. The leadership skills of yesterday will not carry the day in the new and rapidly evolving business landscape. To stay relevant and

competitive, even the most senior leaders must reposition themselves and their organizations - and this will take a mindset reset. Simon will address the critical strategies that allow leaders to stay relevant, while escalating their impact. He will share core principles for acquiring a forward-looking and forward-thinking mindset, while guiding participants in how to discover the insight needed to be a leader for the future. Lastly, Simon will challenge you to commit to becoming the Chief Breakthrough Officer in your organization.

❖ Simon T. Bailey

10:00 – 10:30 **Break with Sponsors – Portman Pre-Function & River Room**

10:30 – 11:30 **Breakout Sessions**

The Long Tail of COVID - Transitioning from Simply Surviving to Thriving – Junior Ballroom

In 2019, the National Center for Education Statistics highlighted that from 2000 to 2016, the private school sector of K-12 education served as the only sector to experience enrollment declines. Many suggest that growing tuition rates coupled with economic turmoil serve as the primary factors for this decline, yet evidence suggests this may connect less to rising tuition and recession and more to underlying sociological change underway within society at large. Fast forward to 2021, many private schools experienced an enrollment boom, stemming from our ability to respond rapidly and dynamically to the COVID-19 pandemic. When the dust settles and we “go back to normal,” will the educational normal remain, or has COVID shaken the core of education as we know it, hastening sociological change that was already underway? Regardless of the answers to these questions, the mission of our schools must go on. This session will discuss these questions, along with strategies schools might employ to provide greater flexibility in their operating models – transitioning from simply surviving in this new world to thriving and leading within it.

❖ Josh Thomason, CPA, MBA

Executive Director, Ethos School & VP of Finance & Operations, Greater Atlanta Christian School

A Traditional Approach Will No Longer Cut It: Unleash People Potential with a Holistic Strategy – Portman Ballroom C

Today's workforce is stressed – most business offices are still overwhelmed and continue to face significant threats to their organization. At the same time, the need to build a healthy, resilient, and financially stable workforce is also increasing at an unprecedented rate. OneDigital's strategic workforce advisors have joined forces to solve business problems together, allowing organizations to support their employees' lives inside and outside the workplace - and in turn, help their organization thrive.

❖ Brian Clark, AIF, CHSA, MBA

Managing Director, OneDigital

❖ Celeste Hough

Regional Controller, OneDigital

❖ David Hughes

HR Consulting Practice Leader, OneDigital

❖ Megan T. Becker

Field Sales Manager, OneDigital

Tango on a Tightrope – Portman Ballroom D

Join us for this interactive session surrounding the annual onboarding of new hires and the timing of their access to a school's systems. Understanding the back and forth between HR, tech, the business office, and the new faculty member is a critical piece that every school contends with

each year - and has possible legal implications. Through the presentation of real-life case studies from the varying perspectives of our panelists, you will learn what not to do and why; and leave with best practices to employ at your school.

- ❖ **Jeff Morrison**
Director of Education Technology, The Trinity School
- ❖ **Anita Pittman**
Director of Human Resources, Carrollwood Day School
- ❖ **Jennifer Carroll**
Attorney, Fisher Phillips LLP

11:30 – 12:30 **Lunch & President’s Address – Portman Ballroom A/B**

12:30 – 1:30 **General Session – Junior Ballroom**

Sourcing Solutions

Sourcing Solutions will provide attendees with a unique opportunity to meet in small groups for mini sessions with experts in the independent school world - MISBO Consortium Partners! Get the latest information from partners new to you or from those you already know.

1:30 – 2:00 **Break with Sponsors – Portman Pre-Function & River Room**

2:00 – 3:00 **Breakout Sessions**

Understanding the Enterprise Risk Management Process in Education – Junior Ballroom

All institutions have a fiduciary obligation to manage risk in an effort to protect the institution, students, faculty, and visitors. Historically, risk management has focused on the hazard risks: damage to property, injury to others, etc. More recently there has been a call for a more holistic approach to risk to include strategic, operational, and financial risks in addition to hazard risks. This session will contain an overview of the resources available to schools and how they can be used to your best advantage. We will undertake a shortened review of the Enterprise Risk Management process.

- ❖ **Robert Rigger**
Relationship Manager for Not-for-Profit Banking, Truist Bank
- ❖ **Chris Smith**
Senior Vice President, McGriff Insurance Services
- ❖ **Mark Voskamp**
Chief Financial Officer, Girls Preparatory School

Performing Under Pressure: How to Lead Your School – Portman Ballroom C

The Children’s School, a progressive age 3 - grade 8 school in Atlanta, has viewed the COVID crisis as an opportunity to proactively reexamine the interplay of our school’s enrollment demand, affordability, and perceived value in the market. The Head of School, Board of Trustees, and leadership team have aligned on one overarching, strategic question to position our school to become more desirable, feasible, and sustainable moving forward: What is our value proposition and how do we quantify and optimize it through a data-informed, realistic assessment of our unique market positioning? Through a robust, multi-phase work approach utilizing both demographic and psychographic research and qualitative and quantitative analysis, we are uncovering what our target families actually want, what we are truly good at, and the right size and price that enables our school to thrive now and in the future. In this interactive session, we will share the process we used to move from Board/Leadership team brainstorming to operationalizing a value propositions statement that drives all the work of the school.

- ❖ **Roslyn Benjamin**
Head of School, The Children’s School

- ❖ Erika Ellison
Assistant Head of School for Operations, The Children's School
- ❖ Allen Broyles
Assistant Head of School for Academics, The Children's School

Top Evolving Trends for Independent Schools – Portman Ballroom D

Although there are some employment law issues that independent schools are likely to encounter on a yearly basis, such as FMLA and wage/hour issues, there are also timely and unique issues that are on the legal cusp and will certainly be encountered, perhaps for the first time, such as transgender issues and unique mental health issues. It is imperative that school leaders understand how to address such issues from a legal perspective. In this session we will explore five of the most difficult issues likely to be encountered by schools and will provide an action plan for dealing with each of those issues.

- ❖ Jennifer Carroll
Attorney, Fisher Phillips LLP

3:00 – 3:30 **Break with Sponsors – Portman Pre-Function & River Room**

3:30 – 4:30 **General Session – Portman Ballroom A/B**

How Leaders Can Use Technology and When to Avoid It

“Technology is a useful servant but a dangerous master.” Nobel Peace Prize Winner Christian Lange spoke these words 100 years ago, but this quote could have just as easily been the rallying cry of today’s pandemic-altered environment. Independent school leaders are challenged to understand both the advantages and limitations of technology, weigh the opportunities that best align with their schools’ missions, and know when technology has the potential to do more harm than good. This session will explore how leaders can use technology to make life easier and when to avoid technology in favor of a more humanistic approach. Leaders who are adept at balancing the right mix of tech and non-tech solutions will distinguish themselves and provide much-needed clarity for their schools in today’s unsettled landscape. Christina Lewellen, MBA, CAE, will provide a framework attendees can use to be efficient, discerning consumers of technology solutions and guidance on how to demonstrate technology leadership in the wake of the pandemic.

- ❖ Christina Lewellen, MBA, CAE
Executive Director, ATLAS

5:00 – 6:15 **MISBO On Tap | Beer Tasting Event | Ticketed Event – Area 61 Gallery**

Back by popular demand! Mike Pennington of *The Beer Bros* will walk us through different styles of beer, teaching us the intricacies of hops and fermentation styles. This will be an interactive and engaging event, including blind tastings, snacks, and some surprises!

- ❖ Mike Pennington
The Beer Bros

Friday, October 29

7:45 – 8:30 **Buffet Breakfast – Portman Ballroom A/B**

8:30 – 9:00 **Chair-Elect’s Welcome – Portman Ballroom A/B**

9:00 – 10:00 **General Session – Portman Ballroom A/B**

Create Strategy with Execution in Mind: Replacing Incantations with Momentum

Your schools have created powerful language for what you strive to do in your communities – mission statements, vision statements, core values, admissions brochures, and website landing pages. However, activating that language at the center of the life and the learning of the school is

elusive, particularly as you have been caught in a series of crises that have muted strategic tasks and replaced them with reactive ones. To move through this crucible moment in history, you need to lean deeper into the language you have told the world is most vital to the school, and you need to redouble your work to act strategically even when the issues of the day exert an electromagnet's pull on your time and effort. Ross Peters, Vice President of School Strategy at EXPLO Elevate, will discuss how strategic thinking in a school must be linked to clear-eyed understanding of how it connects to navigating the way forward. He will also introduce us to a way of thinking about strategy that can help your school keep what you have said is most important at the center of the school's work.

❖ **Ross Peters**

Vice President, School Strategy, EXPLO Elevate

10:00 – 10:15 **Break – Portman Pre-Function**

10:15 – 11:15 **Breakout Sessions**

Setting Goals for Action and Finesse – Portman Ballroom C

In this workshop, Ross Peters will lead participants through an approach to goal setting for everyone from Heads of Schools to classroom teachers that makes goals actionable and synthetic, thus not allowing them to be more than an annual task required and then pushed aside for another year. By the end of the session each participant will walk away with a deep understanding of Two, Five, Ten thinking, as well as a good start on creating their own personal Two, Five, Ten.

❖ **Ross Peters**

Vice President, School Strategy, EXPLO Elevate

The Emergence of the COO in Facilities for Independent Schools – Portman Ballroom D

Many CFOs who enter the independent school world are not knowledgeable about facilities operations, apart from their cost. They are highly dependent on their Facilities Directors for strategic and daily operating decisions. However, if the Facilities Director doesn't have sufficient business background, executive skills, or strategic perspective, they may not be successful in shouldering the entire facilities role with the Board. More and more often, to fill the gap, schools are reorganizing the business office around a Chief Operating Officer (COO), whose duties may not include accounting and finance.

❖ **Dennis Palmer**

Senior VP/COO, Building Solutions

❖ **Bill Keslar**

President/CEO, Building Solutions

11:15 – 11:30 **Break**

11:30 – 12:30 **Breakout Sessions**

Using Federal Funds for Services Without Strings Attached – Portman Ballroom C

In this session, schools will explore ways to distance themselves from any strings attached when accepting and utilizing Federal Program (Title, ESSER, EANS I, EANS II, and E-rate) funding. With so many dollars now available to private schools, we'll explore the latest in each fund, while discussing the most effective way to utilize these funds so they add substantial value in services for students, staff, and the families your school serves.

❖ **Jeremy Beck**

Regional Vice President, FACTS Management

Can We Afford or Sustain International Student Programs Any Longer? – Portman Ballroom D

Some of the conditions brought with the global pandemic are here to stay, along with some of the innovations on how to deliver educational programs. What is it really going to take to have robust international programs as a part of our independent school models? How much institutional bandwidth and how many resources will be required to prepare and respond to international students returning to our country and our campuses? We all agree developing global citizens is important, but is having an in-person International Student Program the only way to go? How will you determine risk versus reward for your school? Join this session to understand what the most recent research reveals about the international marketplace.

❖ **Jacqui Yamada**

Consultant, ISM Insurance, Inc.

12:30 – 1:00 **Grab & Go Lunch – Portman Pre-Function & River Room**