



## Full Schedule

### Wednesday, October 26

10:00 – 2:00 **Pre-Conference Workshop | Separate Registration Required**

***Silos Are Good for Grain, Not for Teams***

Schools are made up of many teams: the leadership team, department teams, divisional teams, grade level teams and others. For a school to excel its teams must excel. Yet, precious little time is spent on helping teams understand how to function at a high level. It is not surprising so many teams fail to reach their potential. In this session, we will focus on why teams are so important to a school's success, the dynamics of successful teams and some structures to improve team dynamics and performance.

❖ **Dave Michelman**

Michelman Consulting

3:00 – 5:00 Registration Open

4:30 – 5:00 **New Attendee Welcome**

5:00 – 6:30 **Opening Reception**

### Thursday, October 27

7:45 – 8:30 Buffet Breakfast

8:00 – 3:30 Exhibit Hall Open

8:30 – 9:00 **Chair's Welcome**

9:00 – 10:00 **Keynote Session**

***Achievement Now!***

Achievement Now! Elevate Your Success is a highly interactive program that was created to examine both the timeless core principles of success and specific modern techniques to implement them. For those that want to prosper in today's competitive business market, it is essential to develop confidence, a mindset for growth and productivity, strong consistent habits, and outstanding people skills. This one-of-a-kind program is designed to help people to cultivate these very traits. Whether you aspire to take your career to new heights, build a successful business, improve your physical health, or personal relationships, this program will provide you with the tools that you need to thrive.

❖ **Tyler Enslin**

Tyler Enslin International

10:00 – 10:30 Break with Sponsors

10:30 – 11:30 **Breakout Sessions**

***Shifting from Status Quo Tuition Setting to Sustainable Affordability Strategy***  
Setting tuition strategically, utilizing tuition discounting effectively, and articulating a school's value are vital to every school's ability to survive and thrive in today's independent school landscape. Most schools, however, underutilize data when setting tuition and settle for exploring short-term tuition possibilities without considering or even identifying their optimal enrollment size and price. In this interactive session, John McWilliams (Head of School, The Montgomery Academy) and Nikki Butts (School Strategist, Mehta Cognition) will share actionable frameworks, tools, and next steps your school can use immediately to enhance its perceived value in the market and position itself for short-term success and long-term sustainability.

❖ **Nikki Butts**

Managing Director & Strategic Enrollment Management Practice Leader, Mehta Cognition

❖ **John McWilliams**

Head of School, The Montgomery Academy

***Schools in Transition: The Legal Landscape of Gender Identity and Transgender Issues***

More and more schools are realizing that they may be the next one to have a transgender student or potential faculty member apply, or to have one of their current students or faculty members disclose that they are making a transition. The U.S. Supreme Court issued a landmark decision that extended the prohibition on discrimination under Title VII as it relates to employees, to claims based on sexual orientation and gender identity. Courts are also facing challenges to the law under Title IX, which relates to students, and whether discrimination on the basis of sex includes discrimination on the basis of being gay or transgender. Those claims are likely heading to the Supreme Court for resolution but in the interim, Schools are faced with issues such as whether to accommodate employees and students in light of the current law. This includes individuals' rights to privacy in restrooms and locker rooms. In this session, we will review best practices for communications to members of the community, along with policies and procedures to address bullying, name changes, uniform changes, bathroom changes, competitive sports, overnight field trips, restrooms/locker-rooms, and other school activities. We will discuss complex situations, and how to best integrate students and faculty members as they begin their transition.

❖ **Jennifer Carroll**

Attorney, Fisher Phillips, LLP

***Leveraging the Power of Diverse Perspectives around your Investment Strategy***

One of the keys to successful investing is to consider many different perspectives. Working with a diverse group of advisors can provide you with different points of view, including socially responsibility, ESG and more. Join us to learn how taking advantage of different life experiences and views to develop a differentiated investment portfolio strategy might improve your return.

❖ **Armond Reese, CFA, CAIA, AIF**

Regional Practice Leader, Truist

***Technology Roundtable***

Join your peers as we discuss current products, trends and challenges facing the independent school technology department, you will learn what not to do and why; and leave with best practices to employ at your school.

❖ **Eric Karkau**

Chief Technology Officer, Columbia Academy

❖ **Felix Jacomino**

Director of Technology, St. Stephens Episcopal School

11:30 – 12:30 **Lunch & President's Address**

12:30 – 1:30 **General Session**

***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

2:00 – 3:00 **Breakout Sessions**

***How Do You Record THIS Contribution?***

Contributions are each individual and the guidance is nuanced in how to record non-exchange transactions. In this session, we will have some real talk to simplify how to identify and record donor funds.

❖ **Kathy Ferguson**

Partner, Armanino

***Out-of-the-box Hiring and Career Advancement***

In today's economy, hiring has never been harder. Moreover, recruiting people from other industries can be a difficult proposition for schools. Thus, finding creative ways to fill senior positions is an absolute must. In this session, we'll profile several specific examples of career advancement and out-of-the-box hiring, to show how schools have found hidden or overlooked talent both from within their own talent pools as well as from the larger industry. Come ready to challenge your own perceptions about hiring and advancement and leave ready and inspired to fill any leadership role in your school!

❖ **Gabriel Lucas**

Principal, 12M Recruiting

❖ **Johnny Green**

Chief Financial and Operating Officer, Brandon Hall School

***GEN Z to GEN A: Is Your Dining Ready for the New Cultural Expectation?***

The dining habits and preferences of your students continue to evolve quicker than ever before. As an integral part of the student experience, how does your program address the many facets and demands of your community today? Join us as we discuss new ways you can increase your access to local and diverse food concepts that will appeal to your entire community.

❖ **John Coker**

President, Foodworks – Compass Group

❖ **Melissa Burkus**

Regional Experience Manager, Foodworks

❖ **Nancy Walker**

Regional Vice President, Flik

***The Lifecycle of a Well-Rounded IT Director***

This interactive session will take a look at different stages in the career of an IT Director and different environments in which an IT Director may find themselves. There are several phases (not all-inclusive) that will be examined: 1) Typical modern IT Director and their responsibilities/experience/etc.; 2) next-level - more responsibility/more strategic thinking; 3) highest level - fully independent and functional. This session will afford the opportunity for interaction with other business officers and the chance for questions and learning how to take an educational organization to the next level.

❖ **Eric Karkau**

Chief Technology Officer, Columbia Academy

3:00 – 3:30 Break with Sponsors

3:30 – 4:30 **General Session**

### ***The Role Independent Schools Play in Community and Economic Development***

As communities and states continue to compete for economic development projects and find ways to create jobs, investment, and opportunities for their citizens, it is even more important for our educational institutions to take a proactive approach in building a talented, innovative workforce. During this session, we will explore the diversity of economic development, the changing economic development landscape, and redefine the term workforce development to encompass independent schools. Further, we will examine the role of independent schools in community and economic development, identify how communities can use an asset-based approach that includes independent schools in economic development, and leverage collaboration with independent schools, community and economic development organizations, and partners to build stronger communities. Participants will also have the opportunity to hear relevant data from recent surveys of independent schools and economic development professionals in Georgia.

❖ **Jennifer Nelson**

Public Service Faculty, Carl Vinson Institute of Government

### **5:00 – 6:15 MISBO On Tap | Beer Tasting Event**

Ticketed Event | Hotel Indigo

Back by popular demand! All three 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

❖ **Lowell Aplebaum**

The Beer Bros

❖ **Russ Webb**

The Beer Bros

## **Friday, October 28**

7:45 – 8:30 Buffet Breakfast

8:30 – 9:00 **Chair-Elect's Welcome**

9:00 – 10:00 **General Session**

### ***Planning with a Heart: Cohesive School Transformation for Sustainable Impact***

Education leaders now have access to an integrated planning approach that connects with the heart and soul of the people and institution to activate the mission in a far more powerful and sustainable way. Effective school transformation requires changing the culture and campus environment in a manner that elevates and inspires educators, students, and all stakeholders. In this closing keynote address, Alan Metcalfe and Scott Barron will share insights and examples of a more cohesive planning and leadership method that enables competitive advantage and brings greater joy to the work.

❖ **Scott Barron**

Chief Reinvention Officer, School Growth

❖ **Alan Metcalfe**

Founder & Principal, Metcalfe Architecture & Design

10:00 – 10:15 Break

10:15 – 11:15 **Breakout Sessions**

### ***The Evolution of the COO Role in Independent Schools***

Join this session which features an incredible panel of three independent school leaders with varying years in education. Learn from their stories and experiences in their development in the role of COO.

❖ **Karen Moore**

CFO, Francis Ward Xavier School

❖ **Larry Pittman**

CFO, Carrollwood Day School

❖ **Jerry Benson**

Director of Business Services, Durham Academy

***Managing Employee and Student Mental Health Issues***

Independent schools are not immune from the mental health crisis impacting students and employees alike. This session will help school leaders understand their obligations to provide reasonable accommodations and provide proactive strategies that schools can implement to set expectations of privacy and establish clear lines of communication, especially when addressing student issues.

❖ **Ashley Sykes**

Associate, Venable LLP

***Out With the Old, In with the New: How to Restructure Board Committees so They Advance Your Mission***

We know boards are comprised of well-meaning and supportive individuals, tasked with ensuring their organization adheres to its mission and thrives. Last year the MISBO Board experimented with a unique set of tasks for one of its three committees. After a year's worth of work from the committee members, all involved called it a tremendous success. Board members feel more valued and fulfilled in working on behalf of the association, and the association is better able to respond to real-time issues affecting independent schools. Hear from MISBO President and CEO Damian Kavanagh, along with the committee and group leaders as they share their experiences with this new structure and how it can easily work for other organizations like yours.

❖ **Damian Kavanagh, Ed.D., CAE**

President & CEO, MISBO

❖ **Alan Stob**

Chief Financial Officer/Head of Evert Campus, Grandview Preparatory Academy

❖ **Lee Conner**

Vice President for Operations, Woodward Academy

❖ **Beth Lucas**

Director of Human Resources, Charlotte Latin School

❖ **Dave Michelman**

Michelman Consulting

11:15 – 11:30 Break

11:30 – 12:30 **Breakout Sessions**

***The Great Resignation, Regaining Momentum in the Business Office***

Many organizations are adopting technology and automation to increase efficiency, save costs and mitigate fraud. Join us to learn more about how embracing electronic payments can help your business office regain momentum. Learning Objectives: Discuss current pain points and headaches in the K-12 sector. Uncover ways to increase your efficiency streamline your AP Understand how AP teams can reallocate time and resources

❖ **John Zaudtke**

VP, Sales, Paymerang

***Essential Enrollment Management Questions Every Business Office Should Consider in 2022***

While the admission office is tasked primarily with the recruitment and selection of new students, strategic enrollment management requires school leaders to partner to create a better experience for families and ensure the long-term sustainability of the school. The business office is one of the few teams on campus that interacts with every single family each year, and

you play an essential role in strategic enrollment management. In this session, we'll explore essential questions to consider with your head of school, enrollment leader, and the broader school leadership team to set your school up for success in 2022 and beyond.

❖ **Jim Daughdrill**

Director of Business Development, The Enrollment Management Association

***Technology Roundtable***

Join your peers as we discuss current products, trends and challenges facing the independent school technology department.

❖ **Eric Karkau**

Chief Technology Officer, Columbia Academy

❖ **Felix Jacomino**

Director of Technology, St Stephens Episcopal School

12:30 – 1:00 Grab & Go Lunch