

BUSINESS OFFICE TEAM INTENSIVE

JUNE 12-14, 2022
WOODWARD ACADEMY | ATLANTA

Full schedule

Sunday, June 12

Doubletree Atlanta Airport

4:00 - 5:30 PM	Registration
5:30 - 6:00 PM	Reception
6:00 - 8:00 PM	Dinner & Opening Program
	Loving and Leading Your Team through Social/Emotional Development
	Social/emotional learning is a core part of school culture and building engagement, influencing attitudes and habits that impact individual and organizational growth. In the context of professional development, it means creating environments of trust, meaningful experiences of instruction and dialogue, and consistent feedback loops. In this session we will explore principles and activities to effectively utilize social/emotional learning to advance as a healthy school that is able to achieve greater joy and success.
	<i>Scott Barron, Chief Reinvention Officer, School Growth</i>

Monday, June 13

LJ Lecture Room in Jane Woodruff Hall | Woodward Academy

8:30 AM	Bus from Hotel to Woodward Academy
8:30 - 9:00 AM	Registration
9:00 - 9:15 AM	Welcome
9:15 - 10:15 AM	Inflation, Data, and Tools You Can Use
	Join Toni Boyd, Westminster's Vice President of Finance and Operations, as she discusses how data helps create a guide for day-to-day decisions, provides insight for future initiatives, and has been used at The Westminster Schools to fulfill strategic initiatives.
	<i>Toni Boyd, VP of Finance and Operations, The Westminster Schools</i>

10:15 - 10:30 AM	<p>Do You Offer Your Employees a Voluntary Guaranteed Issue Long-Term Care Solution?</p> <p>This quick hit session will cover the following questions:</p> <ul style="list-style-type: none"> - What percentage of the U.S. population will need care someday? - Where do you want your care to be? - What happens if you don't have the money for your care? <p><i>Robert Fish, Managing Partner, Voluntary Benefits at Work</i></p>
10:30 - 10:45 AM	Break
10:45 - 11:45 AM	<p>Are Your Business Payments Safe?</p> <p>Did you know your current check processing is posing risks and exposing your AP payments to payment fraud risks? With internal and external threats on the rise, accounting teams have no time to lose in mitigating the risk of payment fraud, safeguarding sensitive banking information, and ensuring the integrity of the accounting system. Electronic payment solutions, such as virtual cards and ACH transactions, provide greater protections than paper checks, mitigating the risk of payment fraud.</p> <p><i>Kenan Korfez, Account Executive, Paymerang</i></p>
11:45 AM - 12:45 PM	Lunch
12:45 - 1:30 PM	<p>Crossfire Session</p> <p>Join your colleagues for an open session of networking, sharing your knowledge, and asking those questions that keep you up at night!</p> <p><i>Michelle Shea, Vice President, MISBO</i></p>
1:30 - 1:45 PM	Break
1:45 - 2:45 PM	<p>How to Get the Most from Your Accounting Provider</p> <p>There's a lot to be said about having a strong relationship with your accounting firm. Join Smith and Howard Partners, David Lee and Sabre Linahan, who will reveal ways to help you and your school get the most from your accounting provider. This presentation will provide business leaders with ideas and strategies they should receive from their accounting firm during their engagements and throughout their lifecycle.</p> <p><i>David Lee, Partner, Assurance Practice, Smith + Howard</i></p> <p><i>Sarah Dolbier, Senior, Tax Practice, Smith + Howard</i></p>
2:45 - 3:00 PM	Break
3:00 - 3:20 PM	<p>2022 Employee Benefits Benchmarking Review</p> <p>Join Lee Arledge and Mariasha Peterson as they review the results of the USI benchmarking survey, which offers targeted, clean data to drive decisions around benefit costs and programs.</p> <p><i>Lee Arledge, Senior Employee Benefits Consultant, USI Insurance Services</i></p> <p><i>Mari Peterson, EB Actuary, USI Insurance Services</i></p>

3:20 - 4:00 PM	Records Retention and Management
	Summer is a great time to take a fresh look at your school's Records Retention and Management policy and retention periods. Many school administrators face questions about where, how, and how long documents and files should be stored. It's also important to have a process for maintaining documents in the event of potential litigation, and to destroy documents in a safe manner that protects private information. A comprehensive Records Retention and Management policy should be used to help schools manage the retention and destruction of documents from all departments, including admissions files, board documents, donor information, student files, employment files, and business office files.
	<i>Grace Lee, Partner, Venable LLP</i>
4:15 PM	Bus to Hotel
5:30 - 6:30 PM	Informal Happy Hour at Hotel Bar - <i>Sponsored by Smith + Howard</i>

Tuesday, June 14
LJ Lecture Room in Jane Woodruff Hall | Woodward Academy

8:30 AM	Bus from Hotel to Woodward Academy
9:00 - 10:00 AM	Building a Well-Oiled Team
	Consider the Command Center role business offices play in the life of a school. You are the hub that provides life and resources to each of the multitude of spokes (stakeholders) you serve. Under normal circumstances, your team is stretched thin... under COVID circumstances, your team has maxed out its surge capacity to the point of depletion. Chance are you're exhausted and in desperate need of rejuvenation. Join Linda Nelson, Executive Director of NCAIS, as we explore the power of teamwork through DISC. Participants will be asked to complete a short DISC assessment prior to the session.
	<i>Linda Nelson, Executive Director, NCAIS</i>
10:00 - 10:15 AM	Break
10:15 - 11:00 AM	Understanding the Current Insurance and Risk Challenges Facing Independent Schools
	This session will address the variety of unique challenges facing independent schools in dealing with a transformed marketplace impacting access and affordability of liability, property, and cyber insurance for schools.
	<i>Cheryl McDowell, VP, Education Practice Group, Bolton & Company</i>
	<i>Ron Wanglin, Chairman, Bolton & Company</i>
11:00 AM - 12:00 PM	What's Your Political Savvy IQ?
	If you have political skill, you appear not to have it. Truly skillful execution of the behaviors associated with politics is usually perceived as genuine, authentic, straightforward, and effective. Leaders who are not politically skilled come off as manipulative or self-serving. Learn how to measure your own political savvy and how to use it to make your office function at a high level.
	<i>Damian Kavanagh, President & CEO, MISBO</i>

12:00 - 12:30 PM

Wrap Up / Grab & Go Lunch

12:30 PM

Bus to Hotel & Airport

In order to stay for the whole program, book your flight departing after 2:30 PM