

BUSINESS OFFICE TEAM INTENSIVE

JUNE 11-13, 2023
WOODWARD ACADEMY | ATLANTA

Sunday, June 11
Hilton Atlanta Airport

4:00 - 5:30 PM Registration

5:30 - 6:15 PM Welcome Reception

6:15 - 8:00 PM Dinner

Sustaining the Humanity in Education

It feels like the chaos is becoming more chaotic. Ugliness and uncertainty have seeped into so many parts of the broader education experience for educators, students, and society. Campus leaders are challenged with the responsibility of sustaining the humanity in our schools, endeavoring to provide a safe, predictable, and yet inspiring environment, community, and experience. Let's explore these realities along with the opportunities to elevate the quality and authenticity of our institutions to the benefit of all stakeholders.

Scott Barron, Founder and Chief Reinvention Officer, School Growth

Monday, June 12
Woodward Academy
LJ Lecture Room in Jane Woodruff Hall

8:30 AM Bus to Woodward Academy

8:30 - 9:00 AM Registration and light breakfast

9:00-10:00 AM Welcome and Opening Session

Emerging Benefit Strategies and 2023 Benefits Benchmarking Insights

Drive savings and maintain high-value benefits for your faculty and staff in a challenging market. Learn about underwriting, pharmaceutical, and emerging benefits strategies that can identify cost savings opportunities to better manage health plan premiums. Additionally, USI will review the 2023 Benefits Benchmarking Survey results. It is the largest private benchmarking survey in the U.S. Results will provide the following benefits: Identify benchmark group based on size, industry, and geography; Conduct a strategic comparison of benefits program by line of coverage, provisions, rates, contributions, and eligibility; Conclude and communicate key differences from benchmark and identify opportunities to reduce/increase coverage.

Lee Arledge, Senior Employee Benefits Consultant, USI

10:00 - 10:30 AM Break with sponsors

Key Accounting Controls for Independent Schools

In this session we will discuss the internal control environment in private schools. You will learn tangible ways to strengthen your schools controls today and in the future.

Kathy Ferguson, Partner, Armanino

11:30 - 12:15 PM Lunch (Jane Woodruff Hall Atrium)

12:15- 12:30 PM Break

12:30 - 1:30 PM

Best Practices for Dealing with Pushy Parents: How To Avoid Litigation

The biggest headache facing schools today are the unrealistic demands of the “Pushy Parent.” Unfortunately, many schools find today’s parents difficult to deal with. Whether it is a disagreement about a child’s grade, bullying allegation, accommodation request, or behaviors relating to a child custody matter, school administrators and teachers spend substantial time managing today’s parent. The challenge today is to ensure the relationship remains respectful and professional, and that your school maintains control.

Ilanit Fischler, Partner, Fisher Phillips
Jenna Rubin, Attorney, Fisher Phillips

1:30- 1:45 PM

Break

1:45 - 2:45 PM

Payment Card Processing: ‘Put it on the Underhills’

Does your school utilize alternative methods of payment? Have you explored all of the features and benefits of various cards? Plastic has become a currency, in-and-of-itself, and the embedded technology expands its uses beyond simple payment. With different types of cards, your school can manage usage, establish preapprovals, improve documentation, mitigate fraud and create rewards! However, with expanded benefits come greater complexity in use. Join this session to learn the types of cards that are out there and which ones are most appropriate for what uses. We will also discuss implementation, management, cost, and all the features you need to be aware of in utilizing this empowering form of currency.

Bryan Fink, SVP/Treasury Management Product Consulting Manager, SouthState Bank
Cash Christian, VP/Regional Sales Manager, Corporate Payment, SouthState Bank

2:45 - 3:00 PM

Break

3:00 - 4:00 PM

Cyber Security Meets HR and the Business Office: The Inevitable Collision Course

We will discuss cyber security trends that affect business office decision making and operations, as well as Human Resources. Come ready for an interactive session that will help you walk away with tools to be more thoughtful about cyber security in the future.

Torrey Williams, Chief Information Officer, The Westminster Schools

4:20 PM

Bus to Hotel

5:00 - 6:00 PM

Informal Happy Hour

6:00 PM

Dinner on Your Own

Tuesday, June 13
Woodward Academy
LJ Lecture Room in Jane Woodruff Hall

8:30 AM

Bus to Woodward Academy

9:00 - 9:45 AM

The New Mandatory State Payroll Tax for Long Term Care - Coming to a State Near You?

This session will provide a high-level overview of a new mandatory state payroll tax designed to help pay for Long Term Care. This new tax has already been implemented in one state, with others finalizing their plans. Included will be a somewhat likely state by state rollout. Join us as we discuss your potential responsibilities for managing this new state payroll tax, as well as options for opting out, including new products you can include in your benefits package.

Robert Fish, Managing Partner, Voluntary Benefits at Work

9:45 - 10:00

Break

10:00 - 11:00

SIG Hour

Join your colleagues for our Special Interest Group Hour! Select your area of interest and join the group for networking, sharing your knowledge, and asking those questions that keep you up at night!

11:00 - 12:00

Find Security Benefits and Cost Savings in Your Print Management System

PaperCut helps to minimize paper waste while having a secure and easy printing experience for your end users, whether they're printing from a BYOD or mobile device, and makes IT's life easy by auto-deploying print drivers. Typically, PaperCut will reduce print costs on average by 15%.

Steve Petralia, Major Account Executive, Revolution Office

12:00 PM

Wrap Up / Grab & Go Lunch

12:45 PM

Transportation to Hotel & Airport

Best to book flights departing after 2:30 PM