



2024 MISBO ANNUAL CONFERENCE
October 23-25, 2024 | Greenville, SC

Full Schedule

Wednesday, October 23

8:00 – 9:00 Pre-Conference registration

9:00 – 1:00 Pre-Conference Workshop | Separate Registration Required – Redbud

Removing Roadblocks to Remarkable Relationships

What does it take to create an amazing team? How do you build the bridges required to ensure everyone is connecting while also closing the gaps of miscommunication? Organizations are made up of so many diverse personalities! Learning to navigate what does and doesn't work can create roadblocks to creating engaging team experiences. Likewise, our customers and the groups we serve notice when teams aren't on the same page and that creates roadblocks for both sales and service. Creating connections with both your internal team and your customers is paramount to success. Building the right environment for this may be easier than you think! This hand on workshop will have you laughing, learning, and building your way to a better team.

❖ **Russ Webb. CAE**

Executive Director, Bay Area Apartment Association

1:00 – 4:00 Board Meeting – Crepe Myrtle

3:00 – 4:15 Registration Open

4:00 – 4:25 New Attendee Welcome – Networking Lounge

4:00 – 4:25 Sponsor Meeting – Regency D,E

4:15 – 6:30 Opening Reception – Regency Ballroom A,B,C

5:00 – 6:00 General Session – Regency Ballroom A,B,C

Power & Impact: The Head/CFO Relationship

Successful independent schools have several fundamental qualities in common, but one is ubiquitous: a positive and productive partnership between the head of school and the school's CFO. This session explores the qualities of that critically important relationship, regardless of your school's size, and the roadmap for maximizing the relationship for the sake of the school.

❖ **Scott Wilson**

Consultant and Executive Coach, Independent School Management

❖ **Dallas Joseph**

COO/CFO, Baylor School

Thursday, October 24

8:00 – 8:45 Buffet Breakfast – Regency Ballroom Pre-function

8:00 – 3:30 Exhibit Hall Open – Regency Ballroom Pre-function

8:45 – 9:00 Chair's Welcome – Regency Ballroom A,B,C

9:00 – 10:00 Keynote Session – Regency Ballroom A,B,C

❖ **Debra Wilson**

President, National Association of Independent Schools

10:00 – 10:30 Break with Sponsors - Regency Ballroom Pre-function

10:30 – 11:25 Breakout Sessions

Best Practices to Mitigate Fraud and Cyber Threats within your Treasury Platform – Regency D,E

Join our panel discussion as they explore critical areas such as B2B payment fraud, business email compromise (BEC), integrated payable technology, and advancements in card solutions. We will cover best practices for creating a culture of risk mitigation within your finance department, as well as tools to assess your treasury risk profile.

❖ **Peter Kalani**

Truist Bank

❖ **John Lynch**

Senior Vice President, Truist Bank

❖ **Jennifer Cookston**

CFO, Webb School of Knoxville

❖ **Richard Swindell**

Director of Business Operations, Sidwell Friends School

Unleash the Power of Hybrid Learning – Crepe Myrtle

Imagine a future where education is no longer confined to the four walls of a classroom. Picture a world where students have the power to learn anytime, anywhere, and at their own pace. Join us to learn about how Jewish Leadership Academy is utilizing hybrid learning components such as class recordings and seamless edtech integrations to revolutionize education and pave the way for a brighter future.

❖ Joaquin Infante

Director of Technology, Jewish Leadership Academy

Uncovering the Truth: Employee and Student Misconduct Investigations – Regency G,F

Matlock? Law and Order? NCIS? Many school administrators make it through college and beyond without ever being trained as detectives. Unfortunately, schools are having to investigate employee or student misconduct more frequently than ever before. Join this fast-paced, practical and informative session to learn investigation best practices as well as tips and tricks for avoiding pitfalls. Topics will include everything from structuring investigations to questioning witnesses and documenting the process. Participants will put their new skills to work on case studies and have the opportunity to seek answers to their burning investigation questions.

❖ Jennifer Carroll

Partner, Fisher Phillips, LLC

❖ Ilanit Fischler

Partner, Fisher Phillips, LLC

❖ Sara Rubinstein

Head of School, Carrollwood Day School

Mind, Body & Spirit -Redbud

In the wake of the global pandemic, and following a school leadership change, Girls Preparatory School has embarked on an ambitious journey to transform the campus. With a focus on creating environments that fully support the whole student, GPS has been undertaking a series of campus improvements, along with an update to the campus master plan. Taking a balanced approach to these improvements, GPS is transforming a wide variety of spaces across the campus, including a complete re-imagining of the school's library. This session will explore how this school has truly taken a mission-focused approach to its campus and spaces.

❖ Mark Voskamp

CFO, Girls Preparatory School

❖ Peter Winebrenner

Principal, Hord, Coplan, Macht

11:30 – 12:45 Lunch & President's Address – Regency Ballroom A,B,C

12:45 – 1:45 General Session – Studio 220 at Noma A 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.

1:45 – 2:00 Break with Sponsors – Regency Pre-function

Breakout Sessions**Stacking My Capital: Equity, Gift and Debt - How to Decide? – Regency D,E**

There are three primary sources of capital available to schools in funding major improvement. Each comes with its costs and implications. There are, in fact, times when it is more affordable for the institution to utilize debt over the funds on its own balance sheet. And there are times when a school should never consider what might be the lowest cost source of funds. The answers might actually change depending on the impact of the project once it comes online. But how much of each is appropriate? How does leadership decide what to deploy in which situation? The reality is – it depends! Join us for an engaging discussion of balancing institutional priorities, dynamic market drivers and interwoven strategies for optimizing the use of all three. You might find a capital stack that is right for you!

❖ **David Adams**

Senior Vice President, SouthState Bank

Vigilant and Secure: Cybersecurity Best Practices for K12 Schools – Crepe Myrtle

With ever-changing cyber threats, K12 cybersecurity is more complex, especially with limited budgets. This talk addresses the challenges faced by institutions, including the rise of generative AI, social engineering, and the unique aspects faced by K12 institutions. We will cover current cyber threats and offer practical, budget friendly solutions to strengthen defenses. By staying informed and using innovative tactics, K12 schools can better protect their digital assets and maintain data security.

❖ **Erik Brown**

IT Director – Cybersecurity, FACTS

Top 10 Benefit Plan Errors and Prevention Strategies – Regency G,F

Assess and enhance your school's 401(k) or 403(b) benefit plan management now. Join David Lee and Claudia Perez as they highlight common errors and how to sidestep them. Learn efficient management techniques, reducing risks and ensuring participant satisfaction. By preemptively addressing stumbling blocks, pave the way for a successful, stable year. As a trusted resource for independent schools, Smith + Howard is dedicated to supporting your organization's compliance and fiduciary responsibilities, ensuring success in navigating benefit plan challenges.

❖ **David Lee**

Partner, Smith + Howard

❖ **Claudia Perez**

Senior Manager, Smith + Howard

HR Roundtable - Effective Strategies and Best Practices- Redbud

Join your fellow Human Resources professionals in a collaborative discussion on the most pressing issues facing the field in today's independent schools. This interactive session provides a unique opportunity to share insights, exchange best practices, and address common challenges that HR teams encounter in the ever-evolving educational landscape. Whether you're grappling with recruitment and retention strategies, navigating compliance with new labor regulations, fostering diversity and inclusion, or adapting to post-pandemic workplace dynamics, this group forum is designed to foster meaningful dialogue. Bring your questions, share your experiences, and engage with peers who understand the nuances of working within independent school environments.

❖ **Beth Lucas**

Director of Human Resources, Charlotte Latin School

❖ **Anita Pittman**

Director of Human Resources, Carrollwood Day School

3:00 – 3:30 Break with Sponsors – Regency Ballroom Pre-function

3:30 – 4:30 General Session – Regency Ballroom A,B,C

❖ **Nishant Mehta**

Founder/President, MEHTA Cognition

4:45 – 6:15 MISBO On Tap | Beer Tasting Event

Ticketed Event | Studio 220 at Noma A

Join us as we walk 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!

Friday, October 25

8:30 – 9:00 Buffet Breakfast – Regency Ballroom Pre-function

9:00 – 9:15 Chair Elect’s Address – Regency Ballroom Pre-function

9:15 – 10:15 General Session – Regency Ballroom Pre-function

❖ **Jeff Shields**

President & CEO, NBOA

10:15– 10:30 Break

10:30 – 11:30 Breakout Sessions

The Making of the CFO and HOS Team – Regency D,E

The relationship between the Financial Office and the Head of School is critical to the success of the school, yet little attention is paid on how to build a strong relationship. This session will focus on intentionally creating norms and structures that will lead to a successful partnership that will serve the CFO and the Head well.

❖ **Dave Michelman**

Michelman Consulting

❖ **Charles Maumus**

Director of Finance, Oak Hill School

Enterprise Risk Management for Independent Schools – Crepe Myrtle

Implementing effective risk management controls is crucial for independent schools to create a safe and stable environment where the focus remains on student education. This session includes evaluating risks such as cyber threats, physical issues, compliance and how to develop a robust risk management plan with clear policies and procedures to mitigate these risk considerations.

❖ **Kevin Melvin**

Advisor & Risk Management, IMA

❖ **Cheryl McDowell**

Vice President, IMA

Effective Communication Strategies for CFOs and Facilities Directors – Regency G,F

In this session, we will explore strategies to enhance communication between Chief Financial Officers (CFOs) and Facilities Directors. Effective collaboration between these key roles is vital for successful financial planning and facilities management within any school. We will discuss practical techniques for clear and efficient communication, understanding each other's perspectives and priorities, and aligning financial goals with facility needs. Join us to learn how to foster a productive partnership between CFOs and Facilities Directors, ultimately leading to better decision-making and resource allocation.

❖ **Tom Franz**

Senior Associate of Partner Development, Building Solutions

❖ **Bill Dillard**

Director of Partner Awareness, Building Solutions

❖ **Florence Calhoun**

CFO, Episcopal School of Jacksonville

❖ **Scott Carlson**

CFO, Rabun Gap-Nacoochee School

❖ **Krista Webb**

CFO, Christian Academy of Knoxville

Navigating Toxic People in the Workplace – Redbud

Do you work with someone who makes your job difficult? What defines a toxic boss or co-worker? In this session a seasoned CFO and HR Director will cover the impact on individuals and the workplace when dealing with toxic people, and share some coping strategies learned through research and experience.

❖ **Veronique Kessler**

Chief Finance and Operations Officer, San Francisco Friends School

11:30 – 11:45 **Break**

11:45 – 12:45 **Breakout Sessions**

Strategic Insights: Harnessing Data to Navigate Your School's Success– Regency D,E

This session aims to highlight the pivotal role of data in shaping the strategic direction of your school. Despite the wealth of data at schools' disposal, it can be difficult to effectively analyze, visualize, and leverage this information to make informed strategic decisions. Learn how to bridge that gap through practical data intelligence techniques. We will explore methodologies to align simple yet powerful data with your school's strategic plan, ensuring your leadership team and board remain focused on achieving key objectives. Join us to uncover how you can transform raw data into strategic insights, driving your school towards its vision with clarity and purpose.

❖ **Kaitlin Windle**

Co-founder and CEO, Apte

Money Matters to Health and Well-being - Crepe Myrtle

Employees are facing heightened personal and professional challenges, impacting their total well-being. With finances being one of the top stressors in America, mental health issues rising and employees asking for more support, employers must prioritize their people. In this session, we will explore the intricate link between mental health and financial well-being and discuss the essential role finances play in our total well-being and ability to thrive. Additionally, we will share strategies for building resilience and the tools necessary for you to navigate through tough times.

❖ **Amy Todd**

Retirement Plan Consultant, One Digital

❖ **Brian Clark**

Managing Director, One Digital

Abuse Risk Prevention - A Cultural Change - Regency G,F

This session addresses understanding and preventing abuse in school settings, focusing on the mechanisms of abuse, unique risks in educational institutions, and strategies for fostering a culture of safety. We will explore how abuse occurs through access, privacy, and control, review high-level data on campus incidents, and identify red flag behaviors. Small group discussions will cover adult-student boundaries with case studies such as a coach in the locker room, inappropriate touching, and a staff member sitting with a student on the bus. Additionally, we will address student-student sexualized behaviors, offering strategies for supporting students and improving communication between HR and counselors.

❖ **Amber McKeen**

Risk Consultant, Praesidium

12:45

Grab & Go Lunch - Regency Ballroom Pre-function