

BUSINESS OFFICE TEAM INTENSIVE

JUNE 23-25, 2024
WOODWARD ACADEMY | ATLANTA

Sunday, June 23

Renaissance Atlanta Airport Gateway Hotel

4:00 - 5:30 PM Registration

6:00 - 6:45 PM Welcome Reception

6:45 - 8:30 PM Dinner

Lost at Sea

This session will have you join a team of your peers to review a fascinating case study in human nature and problem-solving. Collaborating with others not only allows you to examine your own behavior but also showcases our collective skills and teamwork dynamics. Through this process, you will uncover valuable insights into your own strengths and what we each bring to the table. Have fun as you embrace this opportunity to learn, grow, and excel together!

Monday, June 24

**Woodward Academy
Harison Lecture 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

Leadership: The Journey

The leadership journey is a continual process that grows through leading self, leading others, and leading organizations development process. Starting with fundamentals, how do you prepare for each level and ensure there is a feedback mechanism to validate your growth and true capabilities? The presentation will use both personal growth and examples from Ranger experiences to highlight the journey.

Larry Moores, Moores Leadership Strategy LLC

10:00 - 10:30 AM

Break with sponsors

10:30- 11:30 AM

Ahead of the Curve: Harnessing AI in the Modern Business Office

Join us for an immersive seminar delving into the transformative power of AI within the contemporary business office. In today's rapidly evolving digital landscape, AI has emerged as a pivotal force, reshaping traditional paradigms and revolutionizing how businesses operate. This seminar serves as a learning opportunity for professionals seeking to harness the potential of AI to drive innovation, efficiency, and sustainable growth within their organizations.

Asbury Stembridge, Financial Analyst, The Westminster Schools

11:30 - 12:15 PM

Lunch (Jane Woodruff Hall Atrium)

12:15 - 1:15 PM

What Schools Need to Know About the DOL's New Overtime Rules

Employers don't have much time to prepare for the new increases that will take effect in two phases – the first phase on July 1 and the second phase on January 1, 2025. While the first phase appears to help employers by temporarily using a lower salary threshold, this is likely to complicate your planning – so you'll want to start preparing immediately. This session will provide 10 key steps educational institutions can take now.

Ilanit Fischler, Partner, Fisher Phillips

Jenna Rubin, Associate, Fisher Phillips

1:15- 1:45 PM

Break with sponsors

1:45 - 2:45 PM

Managing Up, Managing Down, Managing All Around

Schools expect their business offices to execute their work at a very high level, which not only involves ensuring tight, predictable financial management but also superb communication and efficient decision making. Business office professionals also exercise influence effectively and efficiently, frequently without titular authority, nor the benefit of established working relationships with multiple constituencies throughout the school community. More often than not, faculty, staff, and families' first encounter with the business office takes place when a problem arises, and they tend to enter with finite expectations about a desired outcome. Still, the business office is expected to represent and support the Heads' expectations on policy and best practices. As search consultants who work primarily with business and advancement offices, we see and hear the trials and tribulations of our clients, observing that the best business offices are as skilled at managing relationships, communication, and expectations as they are at managing the budget. In this session, we will explore sources of power in organizations, strategies to communicate with multiple constituencies, including your immediate superior. We will look at several examples of real life challenges we've seen and workshop solutions. We will leave time to explore challenges you're facing or have faced. This presentation will be upbeat, informative, and immediately useful to you in your school settings.

Paul Baly, Senior Search Consultant, Big Back Pack
Clair Ward, Senior Consultant, Mehta Cognition

2:45 - 3:15 PM

Break with sponsors

3:15 - 4:15PM

Elevate Your Audit and Tax Engagements: Strategic Steps for Preparation and Success

Are you looking to take your audit and tax engagements to the next level? Join an engaging session led by Daniel Sage, Kaitlin Becker, and Andrew Hedrich from Smith + Howard, along with Janet Fulbright from Mt. Paran Christian School and Allison Pearson from Woodward Academy. The session is designed to help you excel in both your audit and tax engagements. Together, they will delve into essential strategies and best practices to streamline both processes, making your experience smoother and more successful.

Daniel Sage, Senior Manager, Smith + Howard
Kaitlin Becker, Assurance Manager, Smith + Howard
Andrew Hedrich, Tax Senior Manager, Smith + Howard
Janet Fulbright, Director of Business and Finance, Mt Paran Christian School
Allison Pearson, Controller, Woodward Academy

4:30 PM

Bus to Hotel

5:00 - 6:00 PM

Informal Happy Hour

Renaissance Atlanta Airport Gateway Hotel

6:00 PM Dinner on Your Own

Tuesday, June 25
Woodward Academy
Harrison Lecture Hall

8:30 AM Bus to Woodward Academy

8:30 - 9:00 AM Light breakfast

9:00 - 9:45 AM **Raising the Bar on School Software Security**

School institutions commit substantial effort and resources to safeguard the sensitive data they manage and store. Given the nature and complexity of school operations, they also collaborate closely with various vendors, entrusting them with access to this sensitive information. Therefore, it's imperative that they meticulously assess partners to ensure they uphold the same rigorous standards of security that schools set for themselves. This presentation is designed to offer clear guidance on important areas to consider and fair expectations to have during the vendor evaluation process, in order to ensure that their partnerships are secure and their data remains protected.

David Shunfenthal, Principal Software Engineer, Clarity

9:50 -10:30 AM **Break and Networking**

10:30 - 11:30 AM **Is Your School Like My Smartphone – Full of Unutilized Potential?**

Schools are good at identifying areas for improvement that will enhance the delivery of the mission during accreditation and during strategic planning. This session will explore the opportunity to create processes and practices that lead to ongoing improvement for every department in the school. Participants will explore the implementation of Kaizen and continuous improvement principles in school contexts, reflecting on current practices, identifying areas for improvement, and appreciating collaborative improvement processes as both quality enhancements and marketing opportunities. Join us to uncover untapped potential in your school and its departments!

Tom Franz, Principal, Tom Franz Consulting

11:30 - 12:30 PM **Compensation Studies and Benefits Trends**

Join us for an updated look at the USI Trends in Benefits Survey results followed by an overview of how to build a compensation studies.

Damian Kavanagh, President & CEO, MISBO
Lee Arledge, Partner & Senior Employee Benefits Consultant, USI Insurances Services

12:30 PM

Wrap Up / Grab & Go Lunch

12:45 PM

Transportation to Hotel & Airport