



Full Schedule

Wednesday, October 22

1:00 – 2:00 **Pre-Conference registration**

2:00 – 4:00 **Pre-Conference Workshop | Separate Registration Required - Southern Ground**

Effective Feedback

Creating a culture that embraces frequent candid feedback is essential to the growth of both individuals and organizations. Without it, productivity falls, communication becomes ineffective, and ultimately employee engagement and retention suffer. Although these facts are well known, many still avoid feedback because it can be uncomfortable or even feel personal at times. In this highly interactive training participants will be equipped with specific skills to deliver even challenging feedback in a way that is both effective and empathetic. Also, attendees of this program will learn specific techniques to receive feedback in a way that allows them to manage their internal and external responses, and as a result gain value from each exchange. While this topic is of particular interest to those in leadership roles, the concepts discussed in this training are essential for employees of all levels to implement.

❖ **Tyler Enslin**

Tyler Enslin International

Beyond the Sticker Price: Perceived Value, Affordability, and Maximizing Mission-Aligned Net Tuition Revenue – Ocean Way

In today's competitive and uncertain landscape, how can independent schools align mission, enrollment strategy, and financial sustainability? This interactive workshop offers practical, data-informed strategies to help schools meet net tuition revenue and enrollment goals while building long-term financial health. Drawing on insights from the Enrollment Management Association's (EMA) 2025 report *An Independent School Education: Family Perceptions of Value and Affordability* and the joint EMA-NBOA-NAIS 2022 *Cost-Per-Enrollment Study*, the session explores how family perceptions and institutional costs intersect. Designed for Heads of School, CFOs, and senior leaders, this session provides tools for tuition strategy, collaboration, and sustainable decision-making.

❖ **Ari Betof**

Co-founder and Partner, Mission & Data

❖ **Christina Dotchin**

Vice President, Enrollment Management Association

3:00 – 4:15 **Registration open**

4:00 – 4:25 **New Attendee Welcome – Blackbird**

4:00 – 4:25 **Sponsor Meeting – Sound Emporium**

4:15 – 6:30 Opening Reception – Starstruck

5:00 – 6:00 General Session – Starstruck

Mastering Your Memory

The human brain possesses an incredible amount of power to store and recall information. Unfortunately, most people are never taught how to fully access this ability. In this fun and highly engaging training, attendees will learn unique and exciting methods to increase their memory skills to extraordinary levels. Most importantly, this program teaches participants how to use these concepts in daily life. Instantly recalling people's names, giving presentations without notes, increased focus, and improved mental organization are just a few of the practical benefits of this intriguing program.

❖ **Tyler Enslin**

Tyler Enslin International

Thursday, October 23

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

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

8:45 – 9:00 Chair's Welcome – Symphony Ballroom II & III

9:00 – 10:00 Keynote Session – Symphony Ballroom II & III

Merging for Impact: Informing the Holistic Student Journey

The Enrollment Management Association (EMA) and the Education Records Bureau (ERB) merger presents exciting possibilities for independent schools. Combining the complementary strengths of each organization has the potential to bridge the gaps between Admissions and Academics, unlocking unique insights, creating synergy, and transforming the student and family experience from enrollment through graduation. CEO Mike Flanagan will discuss how he's leaning into his 30+ years in independent schools, nonprofit association, and educational technology to unify these organizations and define the roadmap forward. Flanagan previously served as the CEO of Mastery Transcript Consortium (MTC) and as CEO of School and Student Services (SSS) at the National Association of Independent Schools (NAIS).

❖ **Michael Flanagan**

CEO, New Org

10:00 – 10:30 Break with Sponsors – Symphony Ballroom Pre function

10:30 – 11:25 Breakout Sessions

Debt Duality: How to Finance Your Future – Southern Ground

When you break it down, there are two basic forms of debt that an independent school will consider in its capital improvement funding: long-term and short-term. 'Core Debt,' is reserved for project financing that transforms a campus and will remain for some time. 'Pledge Monetization Debt' is used to advance funding during a major capital campaign. Both are valuable tools. But how do you know when to use which? How much of each? How to determine the optimal integration of the two? Where do they come from? Join us for an informative and interactive conversation about these two basic types of debt and how they can empower your future.

❖ **David M. Adams**

Director, Governmental & Not-for-Profit Banking, SouthState Bank

❖ **Nancy Lewis**

SouthState Bank

All Aboard the AI Train: It's Not Too Late to Get on Board – Ocean Way

Artificial intelligence is all around us—but many independent school professionals on the operations side still feel like they've missed the train. This session is a welcoming, non-technical introduction to AI for those in roles like HR, finance, advancement, communications, admissions, and other administrative or non-instructional positions. Attendees will explore practical, real-world uses of AI tools like ChatGPT and Claude through live demos and examples tailored to everyday workflows—drafting content, summarizing documents, generating ideas, and more. No prior AI experience is required. Participants will leave with helpful takeaways, including beginner-friendly prompt templates and curated tool suggestions, and the confidence to begin using AI in meaningful ways.

❖ **Felix Jacomino**

Director of Technology, St. Stephens Episcopal Day School

Protecting Your School Through Clear, Compliant, and Effective Dialogue – Blackbird

Independent school leaders frequently face sensitive situations—whether responding to concerned parents or having difficult conversations with employees whose behavior or performance affect the school community. How these conversations are managed can either build trust or undermine it. This interactive session equips leaders with practical tools to navigate challenging communications with professionalism, empathy, and legal compliance. Through breakout discussions and real-world case studies, participants will practice delivering difficult feedback, addressing inappropriate behavior, and managing parent expectations. Attendees will leave confident in their ability to handle complex conversations with clarity, consistency, and compliance.

❖ **Jennifer Carroll**

Partner, Fisher Phillips

❖ **Ilanit Fischler**

Partner, Fisher Phillips

The Seasoned IT Director – Sound Emporium

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

❖ **Erik Karkau**

Chief Technology Officer, Columbia Academy

11:30 – 12:45 Lunch & President's Address – Symphony Ballroom II & III

12:45 – 1:45 General Session – Symphony Ballroom I

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

The Education of Business: Why and How to Start a Business Curriculum & Program – Southern Ground

As the Head of School for Hilton Head Preparatory School, Paul will share a bit of his personal background in private school education while also introducing us to the largest private school on Hilton Head Island, a school that began back in 1965 often paralleling the development of Hilton Head Island itself. His introduction will set the stage for the presentation to follow which will be led by the new Director of the Institute for Business and Innovation, Jeff Rehling. Jeff will share the background, opportunity and challenges associated with creating and launching a comprehensive business program that has quickly achieved tremendous success in terms of student motivation, college acceptances, career progression, community impact, and school differentiation.

❖ **Paul Horgan**

Head of School, Hilton Head Preparatory School

❖ **Jeff Rehling**

Director – Institute for Business & Innovation, Hilton Head Preparatory School

Economic Outlook and Market Dynamics in Uncertain Times - Oceanway

This session offers an analysis of key economic indicators, financial market trends, structural forces shaping today's complex environment and more. With particular focus on interest rates, attendees will gain valuable insights to help navigate risk, seize opportunities, and make informed strategic decisions in this economic climate.

❖ **Brandon Artigue**

Director, Financial Risk Management, Truist Securities

Recruiting, Training and Developing Leaders in Facility Management - Sound Emporium

Explore how school leaders and facilities directors are strengthening their teams through intentional hiring, mentoring, and leadership development. This session highlights strategies for diversifying the talent pipeline—especially by including women and veterans—and offers actionable insights on identifying and growing future leaders. Ideal for business officers and operations professionals focused on building high-performing, future-ready teams.

❖ **Anna Ellington**

Director of Operations, Atlanta International School

❖ **MaSheena Johnkins**

Assistant Vice President for Human Resources, Woodward Academy

❖ **Tom Owenby**

Director of Facilities, Porter Gaud School

❖ **William Dillard**

Director of Partner Awareness, Building Solutions

Mission Meets Margin: Aligning Auxiliary and Business Office Operations - Blackbird

What makes an auxiliary program not just successful, but sustainable? It's the internal systems—financial practices, contracts, and workflows—that keep everything running smoothly. In this session, a Business Office team and Head of Auxiliary Programs share how they built a collaborative, behind-the-scenes structure that supports both growth and accountability. Together, they'll unpack their approach to zero-based budgeting, reconciling auxiliary activity in the general ledger, integrating student billing, managing third-party vendors, and navigating pricing strategy with long-term goals in mind. Risk management and internal controls will also be discussed, with a focus on how to create alignment between business operations and programmatic vision. This session is ideal for schools looking to tighten up the operational side of auxiliary programming—and build a strong foundation for financial health and scalability.

❖ **Joe Ali**

Head of Auxiliary, Carrollwood Day School

❖ **Synthia Fuentes**

Accounts Receivable Specialist, Carrollwood Day School

❖ **Amber Palinkas**

Controller, Carrollwood Day School

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

3:30 – 4:30 General Session – Symphony Ballroom II & III

AI For Dual Transformation

Philippa Hardman from Cambridge University has said that if teachers integrate AI into what they already do, it “will accelerate, automate, and scale traditional, broken methods of instruction.” Meanwhile, AI agents are on the cusp of automating many tasks—which will cause school operations to feel like they've gone from 30 to 70 mph.

As AI evolves faster than we can civilize it, what can we do? One thing is for sure: what got us here won't get us there. But we can find a compass in dual transformation. Using lessons from schools around the world, we will explore how schools can maintain a stable operation while developing a bridge to the future.

❖ **Christian Talbot**

President & CEO, Middle States Association Commission on Elementary and Secondary Schools

4:45 – 6:15 MISBO On Tap | Beer Tasting Event – Mason's @ Loews Vanderbilt Hotel
Ticketed Event |

Join Mike Pennington of the Beer Bros as he walks 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!

Friday, October 24

8:30 – 9:00 Chair Elect's Breakfast – Symphony Ballroom II & III

9:00 - 10:00 General Session – Symphony Ballroom II & III

The Disciplined Listening Method: Strategic Listening Techniques

What if every conversation you had—whether at work or in your personal life—could open doors to new opportunities? In The Disciplined Listening Method, Michael Reddington, CFI, reveals a powerful approach for uncovering the insight, trust, and collaboration hidden beneath the surface of everyday interactions. Through his unique blend of investigative interviewing experience and business expertise, Michael equips you with skills, perspectives, and techniques that deepen your self-awareness, expand your appreciation for others' experiences, and transform the way you connect. You'll walk away ready to listen with purpose, engage with impact, and turn conversations into catalysts for success.

❖ **Michael Reddington**
President, InQuasive

10:00– 10:15 Break

10:15 – 11:15 Breakout Sessions

Leading Complex Campus Projects in Your Private School – Southern Ground

CFOs play a pivotal role in translating campus vision into operational reality—not just by managing budgets, but by aligning diverse stakeholders around a shared plan. This session focuses on the leadership and coordination required to move from a master plan to actionable blueprint, while balancing aesthetics, functionality, and long-term institutional goals. Through real-world examples, we'll examine the CFO's role in navigating conflicting priorities while fostering trust and accountability among boards, donors, administrators, and project partners. Learn how to mitigate common risks, support academic and operational alignment, and create a culture of transparency throughout the planning and construction process. Ideal for CFOs who are leading or anticipating major facilities projects, this session offers practical insights and peer-tested strategies for building consensus and delivering results.

- ❖ **John Lynch**
Tryon Advisors
- ❖ **Dallas Joseph**
CFO, Baylor School
- ❖ **Tom Owenby**
Director of Facilities, Porter Gaud School
- ❖ **Wendy Tasin**
CFO, Washington Episcopal School
- ❖ **Peter Winebrenner**
Principal, Hort Coplan Macht

Safeguarding the Future: Data Security, AI, and Deepfakes in Independent Schools – Oceanway

This panel will explore how artificial intelligence is showing up in independent schools—from classroom tools to administrative systems—and why it's critical to understand the risks that come with it. We'll look at how schools can better protect student and institutional data, what deepfakes are and how they might affect school communities, and the practical steps leaders can take to respond. Whether you're a school head, IT leader, or educator, you'll leave with clear, actionable guidance to help your school stay informed and secure in a fast-changing digital world.

❖ **David J. Walton, AIGP, CIPP/US**

Partner, Chair of the Artificial Intelligence Team, Fisher Phillips

❖ **Jennifer Carroll**

Partner, Fisher Phillips

❖ **Carrie Andersen**

General Counsel, Pine Crest School

Bridging the Gap: Cultivating a Faculty Culture That Embraces the Business of School – Sound Emporium

"I wish our faculty understood we are a business." It's a common challenge in independent schools—teachers focused solely on the classroom, disconnected from the financial engine that sustains it. But when faculty embrace their role in the broader mission—including concepts like retention, brand, and customer experience—the impact can be transformative. This session shares how one Head of School successfully shifted faculty culture to foster shared ownership of the school's financial health, leading to stronger alignment, deeper engagement, and more sustainable outcomes for business officers and the entire school community.

❖ **Hugh Jebson**

Head of School, St. John's Episcopal Parish Day School

HR Jeopardy – Blackbird

Put your HR knowledge to the test in this lively, game-show-style session! From compliance quirks to culture and leadership, HR Jeopardy brings learning to life with fun, friendly competition. Come play, cheer, and see who will be crowned HR Jeopardy Champion!

❖ **Anita Pittman**

Director of Human Resources, Carrollwood Day School

11:15 – 11:30 Break

11:30 – 12:30 Breakout Sessions

Insights in Minutes: Four Ideas That Matter

MISBO Unboxed: Tools (Tools of the Trade + Powerful Purchasing) – Southern Ground

Join the Director of the MISBO Purchasing Consortium, Susan Kimmel to learn all about MISBO Purchasing Toolkit—your not-so-secret weapon for smarter spending and bigger savings. You will learn about everything you need to simplify procurement, flex your consortium power, and make your budget work harder (so you don't have to).

❖ **Susan Kimmel,**

Director of the Purchasing Consortium, MISBO

The Future of LTC in America – Southern Ground

Who will take care of you, how much will it cost, what are my options, common misconceptions, what are the trends, AI assisted Robots and more. Yikes! These are just some of the topics that will be discussed – join us and bring your questions!

❖ **Brian Ely**

Principal, Voluntary Benefits at Work

Quick Tips for HR

Join us for a lively quick hits session on the biggest challenges facing school HR teams this year—and the actionable steps you can take to tackle them. In just minutes, you'll walk away with practical, ready-to-use ideas to help your school navigate legal changes and more.

❖ **Ilanit Fischler**

Partner, Fisher Phillips

❖ **Jenna Rubin**

Partner, Fisher Phillips

Cost Reduction on Managed Printers through Tiered Color – Southern Ground

Learn about an easy way to save your school thousands with no change in quality!

❖ **Jesse Long**

Regional Director, AOT

A New Instructional Approach: Cultivating Innovators, Leaders, and Global Thinkers in Today's Classroom – Oceanway

In a world defined by rapid change, interconnectedness, and complex challenges, today's students must develop more than academic proficiency—they must become creative problem-solvers, ethical leaders, and culturally competent global citizens. This session introduces a transformative instructional approach designed to do just that. Blending inquiry-based learning, interdisciplinary thinking, and real-world application, this model empowers educators to reimagine the classroom as a launchpad for innovation, leadership, and global impact. Participants will explore key strategies for fostering student agency, critical thinking, and collaboration, and will leave with practical tools to design learning experiences that prepare students to thrive in an unpredictable future.

❖ **Patrick Yuran**

Headmaster, Oak Mountain Academy

Duty, Honor, Education: The Strategic Case for Hiring Veterans at Independent Schools – Sound Emporium

Independent schools are uniquely positioned to benefit from the leadership, resilience, and mission-driven mindset of military veterans. In this session, we will explore the strategic advantages of actively recruiting and integrating veterans into the independent school workforce. From classroom instruction to administrative leadership, veterans bring diverse skill sets, a commitment to service, and a deep understanding of mentorship that aligns closely with the values of independent education. Whether you are an administrator seeking new talent, or an educator curious about diversifying your team's experience and perspectives, this session will offer a compelling case—and actionable steps—for including veterans in your hiring strategy.

❖ **Larry Pittman**

CFO/COO, Carrollwood Day School

IT Roundtable – Blackbird

Interactive roundtable for IT Directors, CIOs, CTOs, or whatever your title is. If you are the head of the IT Department, this session is for you. We will discuss day-to-day operations, challenges, as well as planning and management.

❖ **Erik Karkau**

Chief Technology Officer, Columbia Academy

12:30

Grab & Go Lunch – Regency Ballroom Pre-function