



Full Schedule

Sunday, June 22

Renaissance Atlanta Airport Gateway Hotel

4:00 - 5:00 PM Registration – Hotel Lobby

5:00 - 6:00 PM Welcome Reception - Tango Terrace

6:00 - 7:30 PM Dinner

6:30 - 7:30 PM **Elevating Culture from the Business Office**

Culture is the ultimate strategy, especially for a mission-driven organization like an independent school that seeks to transform lives. Some of the more important innovations in education are happening outside the classroom. Those who lead from the business office are a critical asset in the pursuit of authentic, sustainable excellence, facilitating deeper trust and a growth mindset to achieve disciplined productivity and collaboration. Knowing how to elevate culture ensures the business office maintains leadership relevance and contributes to a vibrant organization.

❖ Scott Barron

Chief Reinvention Officer, School Growth

Monday, June 24

Woodward Academy

8:15 AM Bus Leaves Hotel

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

9:00 - 10:00 AM **Beyond the Budget: 5 Ways to Lead, Influence, and Transform Your School**

In this session, we'll explore how the business office can be a hub of leadership and cultural transformation. Learn five key ways to use financial strategy, collaboration, and innovation to shape school culture, boost faculty morale, and support your school's mission. Whether you're a new finance professional or an experienced CFO, discover how to drive leadership and positive change through financial decisions, build partnerships, champion innovation, and enhance communication. Let's move beyond spreadsheets and strengthen your school community through impactful leadership.

❖ Toni Boyd

Vice President for Finance and Operations, Westminster Schools

10:00 – 10:30 AM Break with sponsors

10:30– 11:30 AM **Keeping the Boat Afloat, the Pressures of Setting a Sustainable Budget**
Budgeting is more than just a short-term financial plan—it's a long-term strategic process. How can we align the Finance Committee, Board, and Administration to create a budget that meets immediate needs while also positioning the school for future success? This session will explore how to identify and align key budget drivers, integrate programs, people, and facilities into a comprehensive financial plan, and navigate the challenges of budgeting with uncertain enrollment projections. Learn how to create a mission-driven budget that effectively pools resources to support your school's long-term goals.

❖ Todd Morris
Finance Director, UMS-Wright Preparatory School

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

12:15 – 1:15 PM **Complex Borrowing and the Language of Debt**
When a school embarks on a transformative journey, the first question often asked is, "How are we going to pay for this?" Whether it's funding capital improvements to the learning environment, investing in tools to support the educational mission, enhancing athletic facilities, or growing endowments to secure the future—the question remains: Where will the money come from? As a result, the business office must serve as the strategic command center for these critical endeavors. This requires not only managing financial resources but also understanding the full spectrum of capital funding sources, strategies, and objectives. In this session, we will explore key components, best practices, and methodologies to help you educate your constituents and guide your school toward sustainable financial success.

❖ David Adams
Senior Vice President, SouthState Bank

1:15 – 1:45 PM Break with sponsors

1:45 – 2:45 PM **Navigating Facilities Management as a New or Aspiring Business Officer**
Independent school business officers—whether new to the role or aspiring—often find themselves managing real estate assets alongside various stakeholders. Without objective campus data, decisions can be driven more by stakeholder preferences than by the actual needs of the school. Successfully planning and executing facilities priorities requires a balance of strategic leadership, information systems, and strong collaboration between senior administration and facilities teams. This session will explore common challenges new business officers face and provide practical strategies for effective facilities management, ensuring alignment with long-term institutional goals.

❖ Tom Franz
Senior Associate of Partner Development, Building Solutions
❖ Karen Moore
Chief Financial & Operations Officer, The Frances Xavier Warde School

2:45 – 3:15 PM Break with sponsors

3:15 - 4:15 PM

HR & CFO Legal Face-Off: The Ultimate Compliance Challenge

Think you've got what it takes to navigate the legal minefield of K-12 employment and student policies? Step up and put your knowledge to the test in this session showdown designed for HR professionals and CFOs! In this interactive session, participants will tackle real-world legal scenarios through fast-paced multiple-choice questions covering key topics like recordkeeping, leaves and accommodations, employment contracts, and more. Each question will spark live discussions on legal requirements, best practices, and strategies to minimize risk. Expect friendly competition, practical takeaways, and plenty of "aha" moments as we explore how to strengthen compliance, enhance policies, and keep your school ahead of legal challenges. Will you emerge as the ultimate legal champion? Join us to find out!

- ❖ Ilanit Fischler
Partner, Fisher Phillips, LLC
- ❖ Jenna Rubin
Attorney, Fisher Phillips, LLC

4:30 PM

Bus to Hotel

5:00 - 6:00 PM

Informal Happy Hour at Renaissance Atlanta Airport Gateway Hotel

6:00 PM

Dinner on Your Own

Tuesday, June 25

Woodward Academy

8:15 AM

Bus to Woodward

8:30 AM

Light breakfast

8:45 - 9:45 AM

Maximizing Collaboration: Best Practices for Auxiliary and Summer Programs within Business Operations

Auxiliary and summer programs are essential components of independent school sustainability, contributing significantly to non-tuition revenue. However, to operate efficiently and maximize their impact, these programs must seamlessly integrate with core business operations. This session will explore best practices for fostering strong collaboration between auxiliary and summer programs and key operational departments, including facilities, human resources, security, dining, and business office functions. This session is designed for new business officers, CFOs, and key members of business office teams seeking strategies to optimize the relationship between auxiliary programming and core business functions. Attendees will leave with actionable steps and tools to enhance efficiency, improve communication, and drive financial sustainability in their schools.

- ❖ Karen McClelland
Director of Auxiliary Programs, Sidwell Friends School

9:50 - 10:30 AM

Break and Networking Hour

Join your colleagues for our networking 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!

10:30 – 11:30 AM

Cost Effectiveness by Division: An Essential Financial Tool

Developed in collaboration with NAIS, the Cost Effectiveness by Division template provides schools with a clear, data-driven approach to analyzing revenue and expenses across divisions. By applying key assumptions, this tool helps schools assess the financial health of each division, revealing operating surpluses or losses, per-student budgetary impact, and any tuition gaps to be addressed through fundraising or investment income. Additionally, a supplemental spreadsheet enables schools to calculate costs at the Lower School class-section level, determining the breakeven enrollment needed to cover direct operating expenses. This session will guide you through leveraging these resources to make informed financial decisions, optimize resource allocation, and strengthen your school's long-term sustainability.

❖ Palmer Ball

President, Palmer Ball Consulting, LLC

11:30 –12:30 PM

Lessons from the Field: A School's Journey to a Smooth Year-End Close and Audit

Year-end closeout and audit preparation can be daunting for any independent school business office, but with the right systems and strategies, the process can be streamlined and stress-free. In this session, we'll take a deep dive into how The King's Academy successfully navigated its year-end financial close and audit preparation. From reconciling accounts and strengthening internal controls to compiling audit-ready documentation, the school's business office team will share lessons learned, challenges faced, and the steps that made the biggest difference. Participants will walk away with practical insights, checklists, and best practices to enhance their own year-end processes and ensure a smoother, more efficient audit experience.

❖ Jamey Wood

Business Officer/Academic Dean, The King's Academy

12:30 PM

Wrap Up/Grab & Go Lunch

12:45 PM

Transportation Provided to Hotel & Airport

