



Schedule

Wednesday, October 21

2:00 – 3:00 Pre-Conference Registration

3:00 – 5:00 Pre-Conference Workshop | Separate Registration Required

Behavioral Threat Assessment & Management for K-12 Schools

This presentation introduces the prevention of targeted violence in schools and demonstrates how the creation and use of a multi-disciplinary Threat Assessment and Management (TAM) team can serve as a powerful tool for school administrators. By identifying, assessing, and managing individuals in crisis, and using real-world examples, the audience will learn to recognize warning signs, risk factors, and protective factors for targeted violence.

❖ **Barbara Daly**

Senior Manager of Crisis Management, Risk & Threat Mitigation, Museum of Modern Art (MoMA)

3:00 – 5:15 Conference Registration

5:15 – 5:45 New Attendee Welcome – Grand Ballroom 4

5:15 – 5:45 Sponsor Meeting – Grand Ballroom 5

6:00 – 9:00 MISBO Birthday Bash – Grand Ballroom 1-2-3

Thursday, October 22

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

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

8:45 – 9:00 Chair's Welcome – Grand Ballroom 1-2-3

9:00 – 10:00 Opening Keynote – Grand Ballroom 1-2-3

Momentum: Amplify Hope – Lead from Where You Are Standing

Simon T. Bailey launches MISBO's 50th Anniversary by exploring the science of hope and the mindset that distinguishes transformational leaders. Drawing on research and real-world insight, he demonstrates that hope is not a soft sentiment but a measurable, strategic force that fuels performance, resilience, and innovation. Simon challenges business officers and operational leaders to see themselves as mission-driven catalysts who shape culture and possibility across their schools. Participants will leave energized, equipped with a practical understanding of how amplifying hope strengthens teams, sharpens leadership, and positions independent schools to thrive in the years ahead.

❖ **Simon T. Bailey**

President & CEO, Simon T. Bailey International, Inc

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

10:30 – 11:25 Breakout Sessions

Communicating During a Crisis: A Strategic Approach for Independent Schools

In times of crisis, clear and timely communication is not just important—it's essential. While schools often invest significant time and resources into developing operational crisis response plans, they often devote less attention to the communication strategies used during and after a crisis. Our session will explore the essential elements of a comprehensive crisis communication plan tailored to the unique needs of independent schools. Whether the incident involves a health emergency, a security threat, a natural disaster, or a reputational issue, the need for cohesive, transparent communication is vital. We will guide school leaders through the communication process from the moment a crisis hits through the critical minutes, hours, days, and weeks that follow. Real-life examples will be used to illustrate both effective and problematic communication efforts. Participants will leave with a template they can adapt for their own schools, including a customizable communication checklist and sample messaging. This presentation is ideal for school heads, communications directors, crisis team members, and any school leader involved in communicating and managing crisis situations.

❖ **Molly Rumsey**

Director of Information Services, Harpeth Hall School

❖ **Jessica Bliss**

Director of Marketing and Communications, Harpeth Hall School

Behind Closed Doors: What Happens During Executive Sessions and How to Lick Your Wounds After a Deficiency

Every school hopes for a clean audit. But when findings surface — or when the Form 990 raises questions your board wasn't expecting — how you respond defines your leadership. This session pulls back the curtain on what actually happens during an audit engagement, what deficiencies really mean, and how school leaders can communicate difficult findings to their boards with clarity and confidence. Drawing on real scenarios, presenters will walk through the behind-the-scenes mechanics of the audit process, the anatomy of a deficiency, and the path forward when things don't go as planned. Attendees will leave with a clearer understanding of: What auditors are actually looking for — and how findings are identified, escalated, and documented How to assess a deficiency, communicate it to your board, constructively, and build a credible remediation plan. What the Form 990 discloses publicly and how to get ahead of questions before your board asks them How to turn a difficult audit cycle into an opportunity to strengthen governance, internal controls, and institutional trust Whether you're navigating a current finding or want to be prepared before one surfaces, this session offers candid, practical guidance for independent school leaders.

❖ **Josh Stinson, CPA**

Assurance Senior Manager, Smith + Howard

❖ **Andrew Hedrich, CPA**

Partner, Smith + Howard

❖ **Daniel Sage, CPA, CFE**

Partner, Smith + Howard

New Auxiliary Program Revenue Streams You're Probably Not Using (Yet)

Many schools are overlooking valuable revenue opportunities already hiding in plain sight. This session explores practical, mission-aligned strategies for generating additional income through underutilized assets, creative partnerships, expanded auxiliary programming, school stores, facility rentals, summer programs, community events, and more. Attendees will learn how peer schools are leveraging existing spaces, staff expertise, and operational resources to diversify revenue without major capital investment. Through real-world examples and actionable ideas, participants will leave with strategies to evaluate opportunities, assess operational feasibility, and identify programs that support both financial sustainability and institutional goals. Whether your school is seeking incremental income or exploring long-term auxiliary enterprise growth, this session will provide practical insights and immediately applicable takeaways for business and operational leaders.

❖ **Tanya Tighman**

Assistant Director of Auxiliary Programs, Sidwell Friends School

How to Lead Business Automation: A Practical Roadmap for Results

Automation is no longer optional for schools that want to remain efficient, competitive, and financially resilient. In this session, we will share how Pine Crest School approaches automation as a strategic initiative and what it delivers across finance and operations. Participants will gain practical insights from improvements in accounts payable, financial reconciliations, and data integrations with platforms including Blackbaud, Magnus Health, Red Rover, and Paycom. The session also outlines the roadmap used, from discovery and process mapping to implementation and ROI planning, including the role of outside partnerships.

❖ **Nancy Greene**

VP for Finance and Operations, Pine Crest School

11:30 – 1:00 Lunch & President’s Address

1:00 – 1:20 Break with Sponsors

1:20 – 2:20 General Session

MISBO SmartTables

MISBO SmartTables 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.

2:20 – 2:35 Break with Sponsors

2:35 – 3:30 Breakout Sessions

Community in the Crossfire: How Schools Can Prepare for and Respond to a Crisis

Employee complaints are inevitable in independent schools—but lawsuits are not. The difference often lies in how school leaders respond in the first hours and days after a concern is raised. This session, co-presented by an experienced school attorney and a Head of School, will walk participants through the lifecycle of a faculty or staff complaint—from initial report to potential litigation—and highlight the critical decision points that can either mitigate risk or significantly increase exposure. Using realistic, anonymized scenarios drawn from independent school settings, presenters will explore how missteps in investigations, documentation, communication, and leadership response can escalate routine issues into legal crises. Attendees will gain practical strategies for managing complaints involving faculty, administrators, and even senior leadership, while balancing legal obligations, school culture, and community expectations. Designed for Heads of School, CFOs, Trustees, and HR leaders, this session focuses on actionable guidance—not legal theory—so participants leave better equipped to respond confidently and effectively when the next complaint arises.

❖ **Jenna Rubin**

Partner, Fisher Phillips LLP

❖ **Dr. Anna Moore**

Head of School, The Howard School

Justifying Your Capital Plan with AI

This presentation addresses the common challenge of managing capital plans using outdated, manual methods like spreadsheets. Our data and progress are manually changed and updated, but the data isn’t helping us make the right decisions. See how we can use AI to speed up collecting our data and keep our data up-to-date! Learn how AI can help us prioritize our backlog, score our needs and help develop scenarios to justify our decisions.

❖ **Ryan Schwartz**

Senior Account Executive, OperationsHERO

Financial Lessons Learned and Mistakes Made from 25 Years as an Independent School CFO

Learn from a seasoned independent school CFO about 5 major mistakes schools make because they do not ask the right questions, as well as 4 tips to help sidestep landmines. Sample spreadsheets and templates will be provided to help school leaders avoid these common mistakes.

❖ **Palmer Ball**

President, Palmer Ball Consulting, LLC

Is the Independent School Group Retirement Plan the Right Choice for Your School's Retirement Program?

Have you ever wondered if the Independent School Group Retirement Plan would be the best fit for your organization? Hear from three leaders from participating schools to learn more about how this multiple employer plan (MEP) helped them reduce costs, fiduciary responsibility, and administrative duties, while enhancing the retirement program offered to their faculty and staff.

❖ **Brian Clark**

Principal and Senior Vice President, OneDigital

3:30 – 4:00 Break with Sponsors

4:00 – 4:55 General Session – Grand Ballroom 1-2-3

Mindset: How Leaders Adapt, Design, and Execute Change

This program challenges independent school operational leaders to translate evolving demands into intentional leadership practices. As schools navigate increasing complexity driven by artificial intelligence, workforce shifts, economic pressures, and changing stakeholder expectations, this session explores how adaptive leadership can move beyond reactive problem-solving to the deliberate design of culture, strategy, and organizational resilience. Through practical frameworks and real-world applications, participants will gain insight into how business officers and operational leaders can step into more strategic roles.

❖ **Vipul Kapadia**

CEO, ThingShift

5:30 – 6:45 MISBO On Tap | Beer Tasting Event – Ticketed Event | Taps at Ph'east

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 23

8:30 – 9:00 Chair Elect's Breakfast

9:00 – 10:00 General Session - Grand Ballroom 1-2-3

Meaning: Why This Work Matters and How We Sustain It

In this culminating keynote, Rob closes the MISBO 50 arc by reconnecting leaders to the deeper purpose behind their work. Framing change as a fundamentally human endeavor, he highlights how relationships, courage, and community are the true drivers of effective leadership in independent schools. The session celebrates the critical role business officers and operational leaders play in shaping lives—not just managing systems—and challenges participants to sustain their leadership through clarity of purpose, meaningful connection, and mission-centered decision-making.

❖ **Rob Evans, Ed.D.**

Executive Director, The Human Relations Service

10:00– 10:15 Break

10:15 – 11:15 Breakout Sessions

Recruit, Hire, and Retain Talent Like A Pro!

Great hiring is the foundation for great teams. A school that does not make a commitment to outstanding hiring puts its program and strategic plan in peril every time a position comes open. This in-depth session will benefit anyone who is directly involved in hiring or talent acquisition, as well as those who are invested in hiring outcomes. We will cover essential techniques and creative tips throughout a recruiting cycle, which together catalyze better diverse applicant pools, create greater internal unity and engagement, and ultimately lead to outcomes and processes that have a greater opportunity for success and long-term retention.

❖ **Thad Persons**

Dean of Faculty, The Westminster Schools

❖ **Gabe Lucas**

Principal, 12M & Ed Tech Recruiting

Demystifying School Technology for Operational Leaders

Independent school leaders are constantly asked to make decisions about technology, cybersecurity, AI, infrastructure, software, and budgeting, often while navigating unfamiliar terminology and rapidly changing expectations. This session is designed specifically for CFOs, COOs, and operational leaders who want a clearer understanding of what school technology investments actually mean, what questions to ask, and what costs are realistic. Through honest, practical conversations from the perspective of a veteran independent school IT Director, attendees will explore the real-world business side of school technology, including cybersecurity, device lifecycle planning, staffing, software licensing, infrastructure, AI tools, and vendor management. Participants will learn how to identify hidden costs, evaluate technology priorities, understand operational risk, and improve communication between leadership teams and IT departments.

❖ **Brannon Fissette**

Director of Information Technology, The Schenck School

State Scholarships? Now what?

Independent schools are increasingly participating in state-funded scholarship programs, including ESAs, vouchers, and tax-credit scholarships. While these programs can expand access and support enrollment growth, they also introduce new operational, accounting, compliance, and strategic challenges for school leaders and business offices. This session will explore how schools can effectively record, reconcile, and manage state scholarship funds, including payment workflows, revenue recognition considerations, internal controls, audit readiness, and reporting practices. Participants will also examine some of the less-discussed implications of scholarship participation, including operational burden, enrollment dependency, governance considerations, and evolving state oversight.

❖ **Jennifer Wylly**

Associate Head of School/CFO/CFOO, Saint Edward's School

❖ **Jenipher Carrasquel**

Accounts Receivable, Saint Edward's School

Creating a High-Performing Custodial Partnership

This presentation outlines a strategic framework for transitioning to value-based custodial partnerships that prioritize operational excellence and student-centered healthy learning environments. It details a selection process—from initial research and pre-qualification to data-driven RFP evaluation—ensuring long-term alignment between campus facility needs and service provider capabilities. Participants will gain actionable insights into auditing technical expertise, sustainability practices, and innovative labor models to secure resilient, high-performance contracts that protect the school's physical and educational assets.

❖ **Tom Owenby**

Director of Facilities, Porter-Gaud School

❖ **Leo Barrios**

Assistant Director of Facilities, Porter-Gaud School

❖ **Bill Rouse**

President, Campus Services Group

11:15 – 11:30 Break

11:30 – 12:30 Breakout Sessions

MISBO Jeopardy

This will be a fun interactive game show style session mixing MISBO trivia and 1970's trivia with some learning appropriate for the MISBO constituent community.

❖ **Anita Pittman**

Director of Human Resources, Carrollwood Day School

From Noise to Alignment: Driving Meaningful Tech Decisions in Schools

Many schools are not lacking ideas or innovation in technology; they are navigating an overwhelming volume of inputs, initiatives, and competing priorities. As a result, leadership teams often struggle to align around what matters most and to make clear, intentional decisions that move the school forward. Building on a comprehensive technology assessment, this session uses real examples and findings to show how schools can move from noise to alignment by establishing shared frameworks for decision-making and connecting technology initiatives to mission-driven priorities. A key focus of the session is how misalignment often stems from disconnected processes and unclear priorities rather than lack of effort. Participants will examine how to create a common lens for evaluating opportunities, reduce reactive decision-making, and build alignment across academic, operational, and technology teams. Through practical examples drawn from assessment work, the session highlights common challenges such as tool proliferation, initiative fatigue, and inconsistent systems, while offering strategies for prioritization and sustainable planning. Designed for school leaders, technology directors, and board members, this session emphasizes clarity, alignment, and disciplined decision-making grounded in real-world insight.

❖ **Aaron Griffin**

Director of Strategic Projects, The Epstein School & 12M & Ed Tech Recruiting

❖ **Ilaria Cortesi**

International Search Consultant, 12M & Ed Tech Recruiting

The Auxiliary AI Workspace: Automating Operations to Focus on People

Auxiliary departments are built on relationships, yet lean teams manage an overwhelming mix of logistics, communication, and daily operations. When administrative demands consume too much time, the human element of auxiliary programming suffers. This session explores how AI and automation can streamline operations while protecting—and strengthening—the personal connections that define successful programs. Using Brooks School as a case study, participants will explore how to design a customized “AI Workspace.” We will look at how to create a foundational knowledge base that incorporates a school’s brand identity, handbooks, and operational guidelines. Through practical examples, attendees will see how AI can instantly improve efficiency in staff scheduling, parent communication, and program management. Designed for both beginners and experienced users, this session provides a responsible framework for implementing AI tools. Attendees will leave with actionable strategies to reduce complexity, improve consistency, and buy back time to focus on staff, families, and student experiences.

❖ **Jacob Andrus**

Director of Auxiliary Programs, Brooks School

Future Proof: Build an ERM Program That Works

Enterprise risk management (ERM) enables independent schools to proactively identify and address risks that impact financial stability, operations, and reputation. While ERM is a shared responsibility, CFOs play a critical leadership role in shaping and sustaining an effective approach. This session provides practical guidance on establishing and leading an ERM committee, including who to involve, how to assess risk across school functions, and strategies for prioritizing and mitigating key threats. Participants will explore tools and frameworks to evaluate risks, align ERM efforts with institutional goals, and strengthen communication with boards and leadership. Attendees will leave with adaptable templates and actionable steps to implement or enhance ERM practices within their schools.

❖ **MaryKay Markunas**

Sr. Director, Member Resources and Programs, NBOA

❖ **Karen Volpi**

Director, Accounting and Finance Programs, NBOA

12:30

Grab & Go Snacks