



AGENDA

Sunday, June 14

3:00 – 5:00 PM Registration

6:00 - 6:30 PM Welcome Reception

6:30 – 8:00 PM Dinner

Monday, June 15

9:00 AM Conference Welcome

9:10 – 10:05 AM **General Session**

Where Does Your School Stand? The DEFCON Framework for School Health (Blue Ridge 1)

This session introduces the Independent School DEFCON Scale, a strategic framework that enables school leaders and boards to assess institutional health, align priorities, and drive informed, timely decision-making across key operational domains.

❖ **Ross Peters**
Explo Elevate

10:05 - 10:25 AM Break with sponsors

10:25- 11:20 AM **Breakout Sessions**

What Great Schools Do Differently: Governance and Leadership Lessons from the Search Table (Blue Ridge 2)

An exploration of governance and leadership patterns observed across high-performing independent schools, emphasizing actionable governance structures and cross-functional alignment strategies.

❖ **Aaron Griffin**
The Epstein School

Building Reserves - Seriously? (Blue Ridge 3)

A leadership-focused session on building operating reserves intentionally and aligning them with long-term sustainability.

❖ **Todd Morris**
UMS-Wright

11:20 – 11:40 PM Break with sponsors

- 11:40 – 12:35PM **Breakout Sessions**
Get Your Employees Ready for Retirement, No Matter Their Age (Blue Ridge 2)
 Retirement readiness at every career stage strengthens employee confidence, retention, and long-term institutional stability when schools take a strategic, proactive approach.
 ❖ **Carrie Eady**
 Darlington School
- Hire, Retain, Repeat: Building a Stronger Team (Blue Ridge 3)**
 Legal and practical strategies for recruitment, onboarding, and retention with reduced risk exposure.
 ❖ **Ilanit Fischler**
 Fisher Phillips
- 12:35 – 1:25 PM Lunch (**E'terie Restaurant**)
- 1:30 – 2:25 PM Breakout Sessions
The Power of Collaboration-Mission driven teamwork for efficient school operations (Blue Ridge 2)
 Tools and workflows to strengthen collaboration between facilities and finance functions.
 ❖ **Tai D. Davis**
 Cary Academy
- Design With Intention: Spaces as Strategic Assets (Blue Ridge 3)**
 A framework-driven workshop on aligning space design with mission, instructional priorities, and measurable return on investment.
 ❖ **Dr. Katrinia Lewis and Linda Gail Walker**
 Meteor Education
- 2:25 – 2:45 PM Break with sponsors
- 2:45 – 3:40 PM **Breakout Sessions**
Beyond Compliance: How to Read Form 990 and Financial Statements for Governance, Strategy, and Transparency (Blue Ridge 2)
 Interpreting Form 990 and financial statements as governance tools, not just compliance documents.
 ❖ **Sabre Linahan & David Lee**
 Smith + Howard
- Blow It All Up! How We Switched Our Entire Accounting System and Expense Management Process in 3 Months and Survived! (Blue Ridge 3)**
 A candid walkthrough of transitioning accounting systems, managing change, and maintaining internal controls.
 ❖ **Robert Martin & Cortney Balicki**
 Academy of Holy Names
- 4:00 PM Beer Trail

Tuesday, June 16

- 9:00 – 9:55 AM **Breakout sessions**
- Healthy Teams, Strong Schools (Blue Ridge 2)**
Practical leadership habits that build trust, accountability, and organizational health across departments.
- ❖ **Avery Nesbitt**
Atlanta International School
- Compensation with Purpose: Paying People in a Way that Matches Your Mission (Blue Ridge 3)**
A strategic, leadership-level session on how schools can design compensation and benefits frameworks that support recruitment, retention, financial sustainability, and a healthy school culture.
- ❖ **Patrick Schuermann, Ed.D.**
OptimaXR
- 9:55 - 10:15 AM Break with sponsors
- 10:15 – 11:10 AM **General session panel (Blue Ridge 1)**
A candid, cross-functional panel featuring a CFO and academic administrator discussing alignment, friction points, and decision-making realities.
- ❖ **Michael Lumuscio, and Rob McArthur**
Carolina Day School
- 11:15 – 12:10 PM **Breakout sessions**
- Off-the-Shelf to On-Purpose: Rethinking Benefits as a Leadership Decision (Blue Ridge 2)**
Health benefits are often treated as an annual renewal exercise. In reality, they are one of the largest strategic cost decisions a school makes. Funding models, volatility, and risk tolerance are leadership choices that influence retention and budgeting stability. This session reframes benefits from 'cheapest option' to 'best structure for our institution.'
- ❖ **Lee Arledge**
USI Insurance Services
- Leading with AI: Practical Applications for School Leadership Teams (Blue Ridge 3)**
A hands-on session exploring practical AI use across leadership functions.
- ❖ **Michael Lumuscio**
Carolina Day School
- 12:10 PM Grab & Go snacks