



BUSINESS OFFICE TEAM INTENSIVE

JUNE 10-12, 2018
WOODWARD ACADEMY | ATLANTA

Full Schedule

Sunday, June 10

DoubleTree Atlanta Airport Hotel

3:30 - 5:30 pm

Registration

5:30 - 6:15 pm

Reception

6:15 - 8:00 pm

Dinner & Opening Program

Join your fellow attendees as MISBO Executive Director Damian Kavanagh presents "Working / Learning Style Inventory & Bacon!" to help you get to know each other, and yourselves, a little better. This opening session engages participants in an examination of their own working and learning style, using a quick assessment tool that helps reveal likes and dislikes, things you embrace and things you avoid, strengths and challenges. You will see both your individual profile and that of your entire team so you can create an engaged atmosphere and a team that can accomplish tasks as a seamless unit.

Damian Kavanagh, Executive Director, MISBO

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Monday, June 11

Woodward Academy

6:00 - 8:15 am *Breakfast Available at Hotel*

8:15 am *Bus to Woodward Academy*

8:20 - 8:45 am *Registration*

8:45 - 9:15 am

Welcome & Political Skills Inventory

Getting along with others is a skill that can be taught, learned, and replicated. Any time you mix people with a power structure, you have politics. This session drills down into four elemental skills that comprise the political skills matrix.

Damian Kavanagh, Executive Director, MISBO

9:15 - 10:30 am

Succeeding Together: Shared Team Leadership

This session explores how teams work together, collaborate, and share leadership most effectively. In much of our work, we face situations that require the input and insights of many people. Effective teams build their strength around leveraging the capabilities of each member of the group. In doing so, the group creates a sense of inclusion and interdependence. During this interactive presentation we will consider: an expanded definition of leadership; how the world is changing and why leadership needs to change, too; what hinders team effectiveness; approaches for building a team that leverages the best of each team player; and how to continually reinforce team performance and shared leadership.

Mark Saine, Senior Director, Client Executive and Leadership Development, TIAA

10:30 - 10:45 am *Break*

10:45 am - 12:00 pm

Speaking Truth to the Numbers

Accountants seem to speak their own language that vaguely sounds like English, but often contains collections of words that have no meaning to the lay person. Phrases like "Revenue Coverage," "Endowment Yield," and "Zero-Based Budgeting" might as well be hieroglyphics to the non-financial person. While accounting and finance are the language of business, often times even the simplest messages can be lost in translation. This session is designed to provide practical tips to help financial and non-financial school professionals improve their communication by finding a common language to discuss the numbers.

Rob Hogan, Controller, Atlanta Girls' School

12:00 - 12:45 pm

Lunch



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Woodward Academy

12:45 - 1:45 pm

Walk and Talk

We will explore the science behind the idea of increased cognitive function during movement, and then put it to the test! Attendees will tackle a hot topic for independent schools while experimenting with a different way to consider and contemplate new ideas.

Damian Kavanagh, Executive Director, MISBO

1:45 - 3:00 pm

Step by Step Audit Prep

Preparing for an audit is lots of fun... said no one ever! But it doesn't have to be a long, laborious process at year end. In this session, we will outline the auditors' goals and explore how the accounting team can prepare documents and schedules throughout the year to satisfy these goals. We will also provide tips for preparing for changes to not-for-profit reporting.

Louise Mann, Controller and Director of Finance, Woodward Academy

3:00 - 3:15 pm

Break

3:15 - 4:15 pm

The Road to Digital Record Keeping: One School's Ongoing Journey

The business office team from The Pine School in Hobe Sound, Florida will share their school's journey moving from paper to digital records. From their starting point of determining need and scope, to outlining a plan for success, to the steps taken along the way, this living case study will outline how they have progressed toward their goal and demonstrate how to apply lessons learned to any size school and business office staff.

Virginia Allen, Assistant Business Manager, The Pine School

Kelly Carlson, Business Office Associate, The Pine School

Larry Pittman, Director of Finance and Operations, The Pine School

4:20 pm

Bus to Hotel

5:30 - 6:30 pm

Informal Happy Hour at Hotel Bar

Dinner on Your Own

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Tuesday, June 12

Woodward Academy

6:00 - 8:00 am *Breakfast Available at Hotel*

8:00 am *Bus to Woodward Academy*

8:30 - 9:30 am

Ethical Dilemmas in the Business Office

This interactive session will center on how to develop and communicate ethical standards and how to support those standards as a team. Paul Ibsen, former Assistant Head of School for Finance and Management at Providence Day School, and Kevin Hanson, Director of Finance and Operations with The Children's School, will share case studies of their experiences and those of their colleagues involving scenarios where they were required to make often difficult decisions based on the ethical response.

Kevin Hanson, Director of Finance and Operations, The Children's School

Paul Ibsen, Former Assistant Head of School for Finance and Management, Providence Day School

9:30 - 10:00 am

Walk and Talk - Ethics

Attendees will explore a posed situational dilemma and, as a team, devise an ethical response.

Damian Kavanagh, Executive Director, MISBO

10:00 - 10:15 am

Break

10:15 - 10:45 am

Crossfire

This session will engage all attendees by posing questions surrounding emerging issues affecting independent schools. The Business Office Team Intensive faculty, along with fellow attendees, will answer these questions and discuss possible solutions. Come share your challenges along with your knowledge, and learn as a team!

Business Office Team Intensive Faculty

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Tuesday, June 12

Woodward Academy

10:45 am - 12:00 pm

Pathways to Leadership: Deepening the Business Office Bench

This session will center on two different perspectives in the identification and development of future independent school business officers. First, a current CFO will explore how to identify promising employees and ways to provide growth opportunities for them, while sharing stories of his own personal journey within independent schools. Then an aspiring business officer will share his perspective and focus on how to identify the areas of growth and development needed to take that next step in securing the CFO or DFO position. Together, through storytelling and discussion, these perspectives will help guide attendees in both positions and provide strategies for continued development.

Charles Maumus, Assistant Head of School for Finance and Operations, Harding Academy

Andrew Phelps, Business Manager, Battle Ground Academy

12:00 - 12:15 pm

Wrap Up / Grab & Go Lunch

12:30 pm

Transportation Provided to Atlanta Airport

Best to book flights departing after 2:00 pm