

2020 MISBO Annual Conference

Navigating Tomorrow

*Schedule shown in Eastern Time



Tuesday, October 27

3:00 – 4:15 **Welcome and General Session**

The Pandemic Recession: The Importance of Adaptability in a Volatile World

As the American economy entered 2020, it was extending the longest expansion in modern economic history. However, this progress was truncated by a global pandemic that pushed the economy into recession by March of this year. In this session, seasoned economists Ben Scafidi and Roger Tutterow review the pre-COVID-19 economic climate, consider plausible scenarios for economic and public health recovery and likely policy responses, and suggest best practices for managing our way through the current health and economic crisis. The session will include suggestions on how independent schools should “audit” themselves for the upcoming challenges and allows for an interactive discussion of best practices.

✦ **Benjamin Scafidi, Ph.D.**

Director of the Education Economics Center, Kennesaw State University

✦ **Roger Tutterow, Ph.D.**

Henssler Financial Endowed Chair, Director of the Econometric Center, and Professor of Economics, Kennesaw State University

4:15 – 5:00 **Welcome Game: Team Trivia / Scavenger Hunt**

Join us for team trivia! Team up with conference sponsors and your colleagues for a fun round of trivia. May the best team win!

Wednesday, October 28

12:00 – 1:00 **Virtual Exhibit Hall**

1:00 – 2:00 **Welcome and General Session**

Relational Leadership

Organizational leadership succeeds when relationships are strong and when trust among teams and belief in the mission are paramount. Max De Pree said, “The first responsibility of a leader is to define reality. The last is to say thank you. In between the two, the leader must become a servant and a debtor.” Three amazing leaders will describe different aspects of relational leadership: managing up, leading laterally, and inspiring individuals. We must learn a good deal about the realities those around us are experiencing so we can help them shape it into a vision for a shared future.

✦ **Toni Boyd**

Vice President for Finance and Operations, The Westminster Schools

✦ **Jim Callis**

Associate Head of School for Finance and Operations, The Webb School

✦ **Laura Turner**

Associate Head of School for Finance and Operations, Franklin Road Academy

2:00 – 2:15

Meet Your Peeps

Finance | Human Resources | Technology | Facilities | Auxiliary

Networking break to get to know a group of your peers and discuss role-specific topics.

2:20 – 3:10

Breakout Sessions

Strategies for Analyzing Net Tuition Revenue

Leverage Net Tuition Revenue to understand your school's enrollment trajectory and health while developing a healthy enrollment and financial aid strategy. Models for analyzing past and future Net Tuition Revenue will be provided, along with guidance on how to have meaningful conversations with constituents and analyze incoming applications for healthy enrollment and financial aid distribution.

✦ **Palmer Ball**

President, Palmer Ball Consulting, LLC

✦ **Mark Vosskamp**

Chief Financial Officer, Girls Preparatory School

Big Picture Benefits Planning

The biggest expense in any school is still people. Whether you are in person, virtual, or in a hybrid model, you still have personnel costs: salaries and benefits. You are pretty good at salaries and staying competitive with your market, but do you really understand the variable needs of employees as they age? And do you have a plan that is flexible enough to meet them where they are? This session digs deep into providing the right mix of benefits for employees at the right time in their life. Your independent school is not one size fits all; why should your benefits package be?

✦ **Jamie Greenleaf**

Lead Advisor, Cafaro Greenleaf

✦ **Linda Kurz**

Vice President of Sales – Special Markets, TransAmerica

Planning Capital Improvement Projects: How Tech Leaders Can Save Time and Money

Long before the first shovel hits the dirt of any school construction or reconstruction project, the technology leadership team must be brought to the table (perhaps even the head of the table). Tech leaders see capital projects through a different lens, and this session will explore in detail the benefits of incorporating their guidance early and often. Lewellen will present the compelling data collected from new research conducted about the role technology leaders play in construction projects and provide examples of how incorporating technology early and often can save valuable time and money. Participants will receive a copy of the full report by the Association of Technology Leaders for Independent Schools, "Role of Technology Leaders in Educational Capital Improvement Projects."

✦ **Christina Lewellen, MBA, CAE**

Executive Director, ATLIS

Finance and Operations: Making the Case for Two Positions That Work Together

As Lausanne Collegiate School grew from 300 students to 800, there clearly became a need to restructure school operations. Supporting added square footage required additional staff, management, and processes. Stewart Crais, Lausanne's Director of Operations, and Troy Graham, Business Manager, will present the case for splitting the traditional role of the Business Manager / CFO overseeing operations, to having two positions that work together for a growing school. Be prepared to participate in this lively discussion!

✦ **Stewart Crais**

Director of Operations, Lausanne Collegiate School

✦ **Troy Graham**

Director of Finance, Lausanne Collegiate School

Auxiliary Programs 2.0

Auxiliary Directors across the country have faced the realization that the standard adjustments we implement to our programming every year are now insufficient. Luckily, some of our common attributes include the ability to properly assess a situation and adapt quickly to the needs of our school and its families. In this session we'll dive into the most significant factors that need immediate addressing in order to stay ahead of the curve. Just some of these are: how to get creative (it's one of our strengths); how to recognize and deliver new programming that follows guidelines and protocols; how to identify, train, and rely on your key players; how to understand financial implications and data; and how to communicate with supervisors, your team, and your families. Join this unique opportunity to share what we've learned, become forward thinkers, and maximize your value.

- ✦ **Corey Colman**
Director of Auxiliary Programming, Porter-Gaud School

3:20 – 3:50 **Sourcing Solutions | Part 1**

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.

3:55 – 4:45 **Breakout Sessions**

The Advantages of Strategic Purchasing

Purchasing is a strategic arm of the organization often overlooked and misunderstood as a clerical role, actually going far beyond cost and time savings. Instead, when centralized, it embodies strategic goals and objectives, fosters continuity for the campus, and supports efficiency and protections that are not found in a de-centralized purchasing model. The right person in this role can make a meaningful difference for your school.

- ✦ **Julie Ray**
Chief Financial Officer, Mount Paran Christian School

Ed Tech Quick Hits

We have six - not four, not five, and definitely not seven - of the greatest minds in the ed tech leadership field assembled together to tell you their stories about a very recent success or failure: and oh, have there been some doozies as we have switched to virtual and to hybrid! We think you will have more than six takeaways based on what this dream team conveys.

- ✦ **Eric Karkau**
Chief Technology Officer, Columbia Academy
- ✦ **Adam Mangana**
Head of School, Benedict Day School
- ✦ **Stacia McFadden**
Chief Information Officer, The Lovett School
- ✦ **Denise Musselwhite**
Chief Information Officer, Trinity Preparatory School
- ✦ **Matt Scully**
Director of Digital Integration & Innovation, Providence Day School
- ✦ **Phil Zaubi**
Director of Technology, Porter-Gaud School

Hiring Panel Discussion: How to Find Diversity, Flexibility, and the Right Skill Set

Steve Mandell (Consultant and former Head of School) will moderate a panel of independent school experts focusing on key topics of recruiting and hiring in the new normal of a pandemic and beyond. Join Steve along with Kathleen Cole, Gabe Lucas, and Thad Persons as they navigate a discussion of these critical questions and more: Are today's staffing needs really different? What are the faculty/staff skills needed for tomorrow and beyond? How do you effectively define your employment culture to find the best fit in your future hires? How do you build recruiting/hiring/on-boarding processes to maintain the best faculty and staff?

- ✦ **Steve Mandell (Moderator)**
Consultant and Educational Outreach, Big Back Pack and Darkness to Light
- ✦ **Kathleen Cole**
Director of Human Resources, The Children's School
- ✦ **Gabriel Lucas**
Principal, EdTech and 12M Recruiting
- ✦ **Thad Persons**
Dean of Faculty, The Westminster Schools

Maintaining Security in the Age of COVID

This session will assist attendees in selecting the most appropriate security safeguards and enhancements they might use to address the COVID climate and the "New Normal" for post-COVID operations.

- ✦ **Dan Stephens**
President, Invictus Consulting, LLC

The Lady or The Tiger: How to Make Good Decisions When the Community is Divided

Let's face it - in the COVID era, the decisions you make have the potential to alienate some of the school's constituencies in profound ways. This session will focus on how to make a decision that is institutionally sound and will keep your community intact when your community seems irrevocably split on an issue (like returning to school in person or virtually). We will lay out a template for how to approach such decisions. We will explore the elements of that decision-making process including what data to collect and focus on. We will discuss the importance of understanding the true sentiments of the community rather than allowing a few squeaky wheels to dominate the conversation. We will ask how to assess options, particularly innovative ones. Finally, we will discuss employing the powerful tool of premortems and how that tool can allow you to assess the risks associated with the road taken or not taken.

- ✦ **Dave Michelman**
Principal, Michelman Consulting

4:45 – 5:00

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7:00 – 8:00

MISBO After Hours: *MISBO On Tap* Beer Tasting with The Beer Bros

Sponsored by A3 Communications, BB&T | SunTrust now Truist, and ISBC

Back by popular demand! The Beer Bros will walk us through different styles of beer, teaching us the intricacies of hops and fermentation styles. This is an interactive and engaging event. A list of beers that will be tasted (and suggested alternates) will be shared several weeks before the event, along with suggestions for snacks to pair with them.



12:00 – 1:00 **Virtual Exhibit Hall**

1:00 – 2:00 **Welcome and General Session**

It's Always Day 1: Inclusive Leadership in the Turbulent 20s

Organizational effectiveness starts with an understanding of the bias and baggage we bring with us to our personal and professional lives and how we show up to those around us. In our current normal of COVID-19 and the social changes happening all around us, the need to challenge our own leadership models has never been greater. Together we will explore these questions: Why do you want to lead? And why would anyone want to be led by you?

★ **Nishant Mehta**

Partner and Managing Director & Independent Schools Practice Leader, Storbeck Search & Associates

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The Next Normal: Accelerating the Schools of the Future Through Disruptive Strategy and Innovation

COVID-19 has dramatically shifted the tide of independent schools. However, with great challenge comes great opportunity to accelerate the future. Colby Morgan, a member of The Enrollment Management Association team, collaborated with industry experts in crafting a groundbreaking special report on our "Next Normal" earlier this year. The report highlighted trends and implications for schools coming out of the pandemic. More importantly, however, the report identified that with an innovative mindset, flexibility, and courage, schools could emerge from this crisis better than they went into it.

★ **Colby Morgan**

Associate Director, Membership and Business Development, The Enrollment Management Association

Effective Financial Governance Through the Business Officer and Board Partnership

In addition to their relationship with the head of school, the board's partnership with the business officer is critical to an independent school's success. Independent school trustees provide foresight, oversight, and insight, and should serve as the school's strongest advocates for its mission and financial sustainability. The board relies heavily on the business officer to understand the business model and pressures facing the school in order to advance its strategic conversations and direction, such that business officers are uniquely positioned to be a catalyst for their board's transformation. Learn how to inspire a deeper level of financial governance for your board of trustees and ensure that you and your board are best positioned to identify and track meaningful school health indicators. This dynamic program, including interactive case studies, will offer business officers the latest tools, resources, and financial reporting insights to support an enhanced working relationship with the board.

★ **Jennifer Osland Hillen, CPA, CGMA**

Chief Learning Officer, NBOA

★ **Mary Kay Markunas**

Director, Member Resources and Programs, NBOA

What's Next for HR Professionals

Join us as a leading HR attorney discusses what's next for independent schools as they navigate through changes due to COVID-19 and beyond.

- ✦ **Jennifer Sandberg**
Partner, Fisher Phillips

Technology Budgeting in Uncertain Times

During this session, the presenters will outline the methods and communication needed to lay the foundations for short and long-term technology acquisitions. Topics covered will include communication, relationship building, short and long-term budget strategies, the importance of research and design, technology leadership, and the role of Director of Education Technology.

- ✦ **Ken Bomar**
Director of Finance, Trinity School
- ✦ **Jeff Morrison, Ph.D.**
Director of Education Technology, Trinity School

Subscribing to Outcomes: When Your LEED Platinum Facilities Don't Perform as They Should

Despite its 2015 renovation and LEED Platinum certification, Green Street Academy (GSA) in Baltimore had heating, cooling, and lighting systems that were not functioning properly. Key staff members were still spending too much time and budget troubleshooting and working with contractors to fix faulty systems, until GSA shifted its energy management to a technology subscription solution which guaranteed those systems would continue to work going forward. GSA is now saving 20% on their energy costs, and when issues arise, they are covered. In this session, Green Street Academy's Executive Director Crystal Harden-Lindsey and MISBO Consortium Partners SouthStar Energy and Sparkfund will discuss how schools can proactively address capital planning, COVID mitigation, and energy management using a subscription to save money, reduce technology risk, and allow business officers and facilities directors to keep the focus on students, not energy systems.

- ✦ **Matt Bosch**
Senior Director, Business Development, Sparkfund
- ✦ **Crystal Harden-Lindsey**
Executive Director, Green Street Academy

3:20 – 3:50 Sourcing Solutions | Part 2

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.

3:55 – 4:45 Breakout Sessions

Defining Your Dollars: Building the Proper Reserves from Within

While many schools were anticipating an economic downturn, no one was preparing for the severity of COVID-19. Your financial reserves are more important now than ever, to possibly support families, maintain facilities, afford (right-size) expenses, and pay debt service. There is no time like the present to start building your reserves the right way and prepare for the next market challenge. Learn how to take control of your funds, define your reserves, establish funding targets, and mold policies around them. Eliminate the confusion surrounding your greatest balance sheet assets – heck, you may even pick up some tricks to fund them!

- ✦ **David Adams**
Director, Stifel, Nicolaus & Company, Inc.

What Could Be Around the Corner for Independent Schools Following the Election

In this session, the NAIS Legal Team will explore some of the top issues facing independent schools both before and after the election. We will review current challenges and explore how election outcomes may impact our schools across the country.

- ✦ **Megan Mann**
Legal Counsel, NAIS
- ✦ **Whitney Silverman**
Staff Attorney, NAIS

A Torch in the Darkness

With a global pandemic, record litigation, and a dramatic increase in governmental audits impacting employers, we are inviting you to come join us for a fun, interactive look at the areas that are most likely to create costly legal exposure at your school. Topics covered will include key points of risk throughout the employment life cycle, common mistakes involving employee leave, the challenges of remote work, and managing the various new pandemic laws. This is a cannot miss for business managers and their human resource professionals.

- ✦ **William T. Krizner**
President, The Krizner Group

Moving Beyond the Return to School – Making Intelligent Facilities Decisions

Within the past six months, schools have completed many tasks of varying accommodations in response to the COVID-19 pandemic: improvements to indoor air quality, changes in cleaning/sanitation procedures, staffing adjustments, creative space utilization, technological adaptation, and the list goes on. There isn't a true one-size-fits-all approach as every school is different. In this session, a facilities industry leader will discuss industry successes and failures utilizing research, surveys, and interviews from independent schools and present the trends showing where leadership may consider their financial investment/commitment to permanent changes due to the pandemic.

- ✦ **William Dillard**
Director of Marketing, Building Solutions
- ✦ **Joe Rayburn**
Director of Sales, Building Solutions

How 2020 Will Shape 2021 Summer Programs

Summer 2020 was either cancelled or dramatically changed due to the pandemic. As we create the new "norm" for our auxiliary programs; what did we learn? What are the new best practices? Join us to unpack lessons learned as we plan, market, and schedule a return to fun. Summer 2021 is open!

- ✦ **Elise Folk**
Director of Auxiliary Programs, Episcopal Day School
- ✦ **Donna Patton**
Director of Camps and Programs, Christ Presbyterian Academy

4:45 – 5:00

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7:00 – 8:00

MISBO After Hours: Cook-Along with [Chef Jet Tila](#)

Sponsored by Flik Independent School Dining

Join us as Chef Jet Tila will be showing us how to make a custom-made MISBO meal. The simple ingredient list and instructions will be shared when you RSVP, so you can cook along with the chef. There might also be live drawings for cookbooks, which he will sign for you live!

Friday, October 30

10:00 – 10:30 **Virtual Exhibit Hall**

10:30 – 12:15 **President's Address and General Session**



We Have a Good Story to Tell

In this session, we will build on what we have heard during the conference from the economic landscape and the human landscape to tell our current and future stories to the wider community. With live interviews and interactive activities, we will give shape and voice to the story you want to tell. The Swahili storytellers have a saying: “The story has been told. If it was bad, it was my fault because I am the storyteller. But if it was good, it belongs to everyone.” We have a good story to tell.

- ✦ **Lowell Aplebaum, FASAE, CAE, CPF**
Master Facilitator and Strategy Catalyst, Vista Cova
- ✦ **Damian Kavanagh, Ed.S., CAE**
President, MISBO