



# 2025 Business Officers Conference

October 6-7 Hotel Fontenot, New Orleans

#### October 6 | 8:30 – 9:00 a.m.

Coffee and Conference check-in

#### October 6 | 9:00 – 10:00 a.m.

The Hidden Cost of Financial Aid: How to Stop Over-Awarding and Under-Enrolling

Katie Gunderman, Chief Operating Officer, Clarity Tuition

Program Level: Basic CPE Hours 1.2

Prerequisites: None

Advanced Preparation: None

#### October 6 | 10:00 – 10:15 a.m.

Break

# October 6 | 10:15 – 11:45 a.m.

#### **Current Legal Issues Facing Independent Schools**

Kristin Smith, Partner, Fisher & Phillips, LLP

Program Level: Basic CPE Hours 1.7

Prerequisites: None

Advanced Preparation: None



# Independent Schools Association of the Southwest

#### October 6 | 11:45 – 12:45 p.m.

Lunch graciously sponsored by



#### October 6 | 12:45 – 2:00 p.m.

#### Designing & Implementing a Sustainable, Mission-Driven Compensation System

Cliff Kling, Senior Executive Compensation and Leadership Strategist for Leadership + Design

Program Level: Basic

CPE Hours 1.5

Prerequisites: None

Advanced Preparation: None

#### October 6 | 2:00 – 2:15 p.m.

Break

#### October 6 | 2:15 – 3:15 p.m.

From Complexity to Clarity: Insurance Strategies and Programs for Cost-Effective School Protection

Bryce Ledbetter, Senior Vice President, Marsh McLennan Agency Stephen McCord, Executive Vice President, Marsh McLennan Agency

Program Level: Basic CPE Hours 1.2

Prerequisites: None

Advanced Preparation: None

#### October 6 | 3:15 – 3:30 p.m.

Break

#### October 6 | 3:30 – 4:20 p.m.

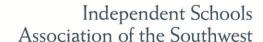
#### **ESA Updates for ISAS Schools**

Scott Griggs, Executive Director, ISAS

Program Level: Basic CPE Hours 1

Prerequisites: None

Advanced Preparation: None





#### October 6 | 4:20 - 5:00 p.m.

#### **Hear from Your Peers**

Questions will be submitted by attendees in advance in 3 categories:

- Human Resources
- Fiscal Responsibility
- Campus Security

The questions will be posed to the room, and the group will answer them together during this session.

No CPE for this session

7.6 CPE for Day 1

#### October 6 | 5:00 – 6:00 p.m.

Reception sponsored by



#### 10-23 | 6:00 p.m.

Dinner and evening on your own in New Orleans

#### Day 2

#### October 7 | 7:30 - 8:30 a.m.

**Breakfast Buffet** 

#### October 7 | 8:30 – 9:30 a.m.

#### Financial Reporting to the Board

A panel of ISAS CFOs discuss best practices for board reporting.

Jeff Bingham, Casady School Evelyn Cambria, Episcopal High School Bryan Denney, Trinity Episcopal School Katie Leto, The Hockaday School

Program Level: Basic Prerequisites: None CPE Hours 1.5

Advanced Preparation: None



# Independent Schools Association of the Southwest

# October 7 | 9:45 – 10:00 a.m.

Break

### October 7 | 10:00 – 11:15 a.m.

#### **Enterprise Risk Management**

Diane Havlinek, Chief Finance and Operations Officer, Presbyterian School Alexandra Penry, Senior Director for Finance and Advancement, Headwaters School

Program Level: Basic CPE Hours: 1.5

Prerequisites: None

Advanced Preparation: None

# October 7 | 11:15 a.m.

Adjournment and Travel Home