



Independent Schools  
Association of the Southwest

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## 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



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

Advanced Preparation: None

CPE Hours 1.5



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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