



NBOA Business Office NOW: East and West

Boston, Massachusetts

November 15-16, 2017

Boston Park Plaza Hotel

Las Vegas, Nevada

April 25-26, 2018

Westin Las Vegas Hotel

Program Overview

Business Office NOW is an affordable and accessible two-day workshop that brings you the latest and most relevant information related to independent school business operations. This dynamic program provides solutions to pressing issues within independent schools with national resources.

Taught by a diverse group of national thought leaders, sessions cover a broad range of topics that will benefit nearly every member of your school's business and operations staff.

Two concurrent tracks—one in accounting and finance and the other in human resources and legal compliance—allow participants to identify the areas of interest that provide the best solutions for their school. This makes the Business Office NOW program perfect for your entire business office.

Don't miss this opportunity to access resources in the areas you need most, understand issues facing independent schools today and take away actionable items that you can implement the day you get back to school.

Register today!





Schedule at a Glance

Nov. 15, 2017 (Boston)/ April 25, 2018 (Las Vegas)

Welcome and Introduction

Opening Keynote

Reception

Dinner

Nov. 16, 2017 (Boston)/ April 26, 2018 (Las Vegas)

Breakfast

General Session: Using Comparative Benchmarking to Create Your School's Roadmap to Enhanced Sustainability

Concurrent Sessions A:

- An Inside Job: Safeguarding Schools by Assessing and Mitigating Fraud Risk with Internal Controls and Cyber Security
- The Value of Performance Management for Independent Schools

Concurrent Sessions B:

- Financial Reporting: A Top 5 and 10 List, 20 Years in the Making
- The Evolving Landscape of Employment and Enrollment Contracts

Lunch

Concurrent Sessions C:

- Tax-Exempt? Not So Fast! Taxation Issues Affecting Independent Schools
- Human Resources' Role in Preventing Abuse

Concurrent Sessions D:

- Great to Greater: Business Intelligence for Independent Schools
- Transgender Employees, Disability and Protected Leave, Wage and Hour Update

Departure

Sequence of events may vary slightly.





Keynote Speakers

Business Office NOW: Boston

Howard Teibel President, Teibel, Inc.

For nearly 30 years, Teibel has partnered with higher education leaders to help them thrive in this new economy. He and his team facilitate team-building and leadership programs, strategic-planning events, and administrative and academic reviews. His vision is that education leaders deal with brutal facts of this industry while building a positive case for change.



Business Office NOW: Las Vegas

Grant Lichtman Author, Speaker, Facilitator

Grant Lichtman is an internationally-recognized thought leader on the transformation of K-12 education. For over 14 years, Lichtman served as trustee and senior administrator at Francis Parker School in San Diego.



Since 2012, he has published three books—*Moving the Rock: Seven Levers WE Can Press to Transform Education*, *#EdJourney: A Roadmap for the Future of Education* and *The Falconer: What We Wish We Had Learned in School*—written numerous articles, and worked with thousands of school and community stakeholders to develop unique and powerful visions and strategies for transforming education.

Finance and Accounting Sessions

An Inside Job: Safeguarding Schools by Assessing and Mitigating Fraud Risk with Internal Controls and Cyber Security

Enterprise risk management is not only tactical and procedural, but also plays a strategic role in a school delivering upon its mission. Regardless of your school's size or resources, learn how to conduct a fraud risk assessment and develop your own fraud risk management program based on five key principles. Independent school leaders—including the board chair, head of school and all business office staff—have responsibility to effectively mitigate risk and must become familiar with the types of fraud that may occur within each area of responsibility for fiscal operations. Industry experts will offer detective procedures for identifying fraud, as well as preventive and monitoring techniques. Hear real-life examples and practice implementation considerations. A successful fraud prevention program leads to stronger internal controls and better processes, enhancing the overall efficiency and effectiveness of the business office.

Financial Reporting: A Top 5 and 10 List, 20 Years in the Making

FASB has rolled out substantial changes in not-for-profit reporting, which had not been overhauled since the initial standards were released in 1993. Learn more about ASU 958, which dictates five significant categories, and anticipate revisions to your school's policies, procedures and financial reporting. Additionally, review the top 10 common accounting and reporting mistakes impacting schools today and the best practices for mitigating them so that your financial statements are best in class for invested readers.

Great to Greater: Business Intelligence for Independent Schools

Hear from an experienced CFO about the strategic conversations her business office is engaging in with school leadership and the board, and the data that informs the important questions to ask. This business officer will share insightful internal analyses and benchmarking against peer schools as well as offer insights into the foundational and aspirational markers that align with the school's financial model and

strategic plan. This work is imperative in driving the strategic conversations — financial, operational, academic, cultural, and more — that help schools become even better than they are today. Get a first look at NBOA's new data platform, Business Intelligence for Independent Schools (BIIS). Examine tools and reports to use as you develop next year's budget.

Tax-Exempt? Not So Fast! Taxation Issues Affecting Independent Schools

As not-for-profit entities schools are generally exempt from taxation. However, tax should always be on the minds of business officers who want to ensure their school complies when it comes to taxes that fall outside of this federal exemption. Such areas include complex gift transactions, hidden compensation and benefits issues, sales tax, unrelated business income and more. Additionally, the IRS has spent increasingly more time examining nonprofit practices such as executive compensation, fundraising activities and other figures and procedures reported on the 990, which must conform to not-for-profit standards to maintain 501(c)(3) statuses. Learn tips and tricks for best practices in taxation and 990 and 990-T reporting as well as pitfalls to avoid in these areas.

Using Comparative Benchmarking to Create Your School's Roadmap to Enhanced Sustainability

Independent schools spend a great deal of time and effort collecting and analyzing information, including comparative operational and financial information, but, in many cases they are not achieving as high a return on their investments as they might. Learn via tutorials, case studies and interactive discussions how to proactively utilize "Level III" comparative benchmarking to identify opportunities to create a multi-year roadmap to increased revenues, reduced expenses and increased asset utilization.

Human Resources and Legal Sessions

Human Resources' Role in Preventing Abuse

Preventing abuse within schools requires strong policies, a comprehensive applicant screening process and clear reporting procedures. Schools' human resources professionals and business officers play a vital role to ensure these mechanisms are in place and effective. Learn specific policies you can implement to protect students and employees and to respond to incidents or allegations of abuse. Examine detailed screening and selection techniques that can be used to eliminate inappropriate applicants who may have a higher chance of crossing boundaries or abusing students.

Is the Grass Really Greener? The Evolving Landscape of Employment and Enrollment Contracts

A well-drafted contract can help schools create clear expectations and mitigate against potential risks. Hear from two independent school lawyers who share tips and practical advice for independent schools to get the most out of your employment and enrollment contracts. Learn strategies and considerations for schools thinking about moving away from annual contracts to "evergreen" or "perpetual" agreements.

Managing and Motivating for Success: The Value of Performance Management for Independent Schools

Independent schools pride themselves on their high-quality and caring faculty and staff. However, many schools admit they are unhappy with their performance management process, citing that it isn't used effectively or they don't have one in place at all. This can lead to poor morale and potential legal risk. Discuss strategies and examine steps that school leaders can take to approach performance management as a positive and effective tool, and the potential benefits: for faculty and staff. Learn strategies for having difficult conversations and issues to consider during the separation process.

Let's Discuss: Transgender Employees, Disability and Protected Leave, Wage and Hour Update, and More

Collaborate and learn from guided case studies on topics that can cause sleepless nights for even seasoned human resources professionals and business officers. Ask questions and discuss shared experiences and lessons learned with fellow attendees.

Attendees may earn up to 7.5 continuing education credits for attending a Business Office NOW program.



NBOA is registered with the National Association of State Boards of Accountancy (NASBA) as a sponsor of continuing professional education on the National Registry of CPE Sponsors. State boards of accountancy have final authority on the acceptance of individual courses for CPE credit. Complaints regarding registered sponsors may be submitted to the National Registry of CPE Sponsors through its website: www.learningmarket.org.



The use of this seal is not an endorsement by the HR Certification Institute of the quality of the program. It means that this program has met the HR Certification Institute's criteria to be pre-approved for recertification credit.

Hotel and Pricing

	Members	Nonmembers
Two-day Business Office NOW Workshop	\$495	\$695

Business Office NOW: Boston November 15-16, 2017



Boston Park Plaza Hotel

50 Park Plaza
Boston, MA 02116
617-426-2000
www.bostonparkplaza.com

NBOA Room Rate:

\$219
(includes complimentary WiFi.)

Reservations: 617-379-7129
Group code is NBOA BO NOW 2017

Meeting schedule is 3 p.m. to 3 p.m.

Receive the guaranteed rate until
October 24, 2017

Business Office NOW: Las Vegas April 25-26, 2018



Westin Las Vegas Hotel

160 East Flamingo Road
Las Vegas, NV 89109-4574
702-836-5900
www.westinvegas.com

NBOA Room Rate:

\$189
(includes resort fee and complimentary WiFi.)

Reservations: 866-837-4125
Group code is NBOA BO NOW 2018

Meeting schedule is noon to noon.

Receive the guaranteed rate until
March 23, 2018

Registration Questions

If you have any questions about registration, please contact Jennifer Fallon, Director, Meetings and Events, at Jennifer.fallon@nboa.org or 202-407-7145.

Attend any Business Office NOW program and be entered for the chance to win an iPad!



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