



**November 15-16, 2017      Boston Park Plaza, Boston, MA**  
**PROGRAM AGENDA**

**Wednesday, November 15, 2017**

**3:00 PM**

**Welcome and Introduction**

*Terrace Room (Lower Lobby)*

Jeffrey Shields, FASAE, CAE, *President and CEO*

National Business Officers Association

**3:15 – 5:15 PM**

**Opening Keynote: Innovating as Orchestrators of Change  
Building a Culture of Creativity & Innovation**

*Terrace Room*

Howard Teibel, *President*

Teibel Education Consulting

At every level in our schools, we are challenged by the question of where to focus our time and energy to make a difference. How do you build a culture of creativity and innovation that forwards the mission? Orchestrating this kind of change demands cultivating a collective mood that inspires and motivates others to let down their protective guard and trust in a new direction. Now more than ever, leaders need to come from this place. In this session, we will explore the mindset of being a change agent and how to transform building community across the divide of academics and administration. Through a cross functional approach to "idea-generation", you will learn how to unleash a new kind of community focus that can transform the delivery of your services and programs.

**Learning Objective:**

Participants will learn skills to develop themselves and others from contributing as individuals to becoming champions who engage others for greater organizational success.

**Field of Study:** Business Management and Organization

**Delivery Method:** Group Live

**Program Level:** Overview

**Prerequisites:** None

**Advanced Preparation:** None

**Recommended CPE Credits:** 2.0

**5:30 – 6:30 PM**

**Reception**

*Statler Room (Mezzanine Level)*

**6:30 – 8:00 PM**

**Dinner**

*Statler Room (Mezzanine Level)*

**Thursday, November 16, 2017**

**7:45 – 8:30 AM**                      **Breakfast**  
*Terrace Room*

**8:30 – 10:00 AM**                      **Using Comparative Benchmarking to Create Your School's Roadmap to Enhanced Sustainability**  
*Terrace Room*  
Dr. Harry Bloom, *Senior Vice President, Client Solutions*  
Measuring Success

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.

**Learning Objective:**

Participants will be able to use comparative benchmarking to create their school's roadmap to enhanced sustainability.

**Field of Study:** Statistics

**Delivery Method:** Group – Live

**Program Level:** Overview

**Prerequisites:** None

**Advanced Preparation:** None

**Recommended CPE Credits:** 1.5

**10:00 – 10:15 AM**                      **Break**  
*Outside Terrace Room*

**10:15 – 11:15 AM**                      **Concurrent Sessions (Please select one)**

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

*White Hill Room (4<sup>th</sup> Floor)*

John Buckley, CPA, *Partner, AAFCPAs*

Cindy Fanikos, CPA, *Assistant Head of School for Finance/CFO, St. John's Preparatory School*

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.

**Learning Objective:**

Participants will be able to assess and mitigate fraud risk with internal controls and cyber security.

**Field of Study:** Information Technology

**Delivery Method:** Group Live

**Program Level:** Basic

**Prerequisites:** None

**Advanced Preparation:** None

**Recommended CPE Credits:** 1.0

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

*Whittier Room (4<sup>th</sup> Floor)*

Grace Lee, Esq., *Vice President, Legal Affairs*, National Business Officers Association

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.

**Learning Objective:**

Participants will learn the value of performance management as a key part of the school's human resources practices and tools to implement best practices.

**Field of Study** Personnel/HR

**Delivery Method:** Group – Live

**Program Level:** Basic

**Prerequisites:** None

**Advanced Preparation:** None

**Recommended CPE Credits:** 1.0

**11:15 AM – 12:15 PM      Concurrent Sessions (Please select one)**

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

*White Hill Room (4<sup>th</sup> Floor)*

Jennifer Osland Hillen, CPA, CGMA, *Director, Accounting, Finance & Tax Programs; Interim Director, Professional Development*, National Business Officers Association

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.

**Learning Objective:**

Participants will be able to implement recent major accounting pronouncements and changes to financial reporting as well as identify common errors to correct.

**Field of Study:** Accounting

**Delivery Method:** Group – Live

**Program Level:** Basic

**Prerequisites:** None

**Advanced Preparation:** None

**Recommended CPE Credits:** 1.0

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

*Whittier Room (4<sup>th</sup> Floor)*

Charla Stevens, *Director, Litigation Department /Chair of The Employment Practice Group*, McLane Middleton

Susan Schorr, *Of Counsel, Education Practice Group*, McLane Middleton

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.

### **Learning Objective:**

Participants will learn the differences between annual and ongoing enrollment and employment contracts to implement best practices at their schools.

**Field of Study:** Business Management and Organization

**Delivery Method:** Group – Live

**Program Level:** Basic

**Prerequisites:** None

**Advanced Preparation:** None

**Recommended CPE Credits:** 1.0

**12:15 – 1:00 PM    LUNCH**

**1:00 – 2:00 PM    Concurrent Sessions (Please select one)**

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

*White Hill Room (4<sup>th</sup> Floor)*

John Toscano, CPA, *Partner, Cohn Reznick*

Lori Rothe Yokobosky, CPA, *Senior Manager, Cohn Reznick*

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.

### **Learning Objective:**

Participants will learn the risk areas that may impact a school's tax-exempt status as well as understand tax issues facing non-profit organizations and how to report them.

**Field of Study:** Taxes

**Delivery Method:** Group – Live

**Program Level:** Basic

**Prerequisites:** None

**Advanced Preparation:** None

**Recommended CPE Credits:** 1.0

## **Human Resources Role in Preventing Abuse**

*Whittier Room (4<sup>th</sup> Floor)*

Aaron Lundberg, LMSW, *President and CEO*, Praesidium

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.

### **Learning Objective:**

Participants will be able to identify risk areas and implement policies to prevent, detect, and address abuse in their schools.

**Field of Study:** Personnel/HR

**Delivery Method:** Group – Live

**Program Level:** Basic

**Prerequisites:** None

**Advanced Preparation:** None

**Recommended CPE Credits:** 1.0

**2:00 – 3:00 PM      Concurrent Sessions (Please select one)**

## **Great to Greater: Business Intelligence for Independent Schools**

*White Hill Room (4<sup>th</sup> Floor)*

Andrea Nix, *Chief Financial Officer*, Phillips Academy

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. The speaker will address enrollment decisions, tuition analyses, financial aid, salaries and benefits, annual facilities renewal spends, reliance on endowment, and more. Examine tools and reports to use as you develop next year's budget.

### **Learning Objective:**

Participants will learn the strategic financial issues facing schools today, which data to analyze and how, and what conversations to advance at the board level.

**Field of Study:** Finance

**Delivery Method:** Group – Live

**Program Level:** Basic

**Prerequisites:** None

**Advanced Preparation:** None

**Recommended CPE Credits:** 1.0

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

*Whittier Room (4<sup>th</sup> Floor)*

**Panel:** Grace Lee, Aaron Lundberg, Susan Schorr, Charla Stevens

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.

### **Learning Objective:**

Participants will learn more about current developments in human resources issues and risk areas including how to mitigate risk and implement appropriate policies.

**Field of Study:** Personnel/HR

**Delivery Method:** Group – Live

**Program Level:** Basic

**Prerequisites:** None

**Advanced Preparation:** None

**Recommended CPE Credits:** 1.0

**3:00 PM**

**Adjourn**