

NBOA Business Officer Institute

June 18-22, 2018 | Moses Brown School | Providence, RI

Don't miss this one-of-a-kind-opportunity to build a foundation of skills, knowledge and support for your career in the independent school business office.



Who Should Attend

- Business officers who are new or relatively new to their roles
- Experienced business officers seeking a tune-up on current issues
- Controllers and next-in-line business officers
- Human resource professionals

Hotel

Providence Marriott Downtown
1 Orms Street, Providence, RI 02904
Phone: 401-272-2400

NBOA Room Rate: \$179/night

- Includes breakfast for one person per room
- Complimentary Wi-Fi
- The room rate is in effect from Sunday, June 17 – Friday, June 22, 2018 (pending availability)
- Mention NBOA to receive the guaranteed rate until May 18, 2018 (pending availability)

Registration

Register online.

Check-in is open Monday, June 18th from 3:30 - 5:30 pm at the hotel.

The opening session begins at the hotel with a reception at 5:30 pm.

Dinner is 6:00 pm at the hotel, and guest speaker begins at 6:30 pm.

	NBOA Member	Non-members
Early Bird Rate (Before 5/6/2018)	\$1,475	\$1,875
Standard Rate	\$1,550	\$1,950

Visit www.nboa.org/BOI to register.

Sponsors



Continuing Education



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.nasbaregistry.org.



NBOA is recognized by SHRM to offer SHRM-CP or SHRM-SCP professional development credits (PDCs). The total number of credit hours available for an individual varies based on sessions attended. For more information about certification or recertification, please visit www.shrmcertification.org.



NBOA is registered with the Human Resources Certification Institute (HRCI) as a sponsor of continuing professional education. Sessions that have met the HR Certification Institute's criteria to be pre-approved for recertification credit will be noted in the onsite program. The use of this seal is not an endorsement by the HR Certification Institute of the quality of the program.

Professional Learning Networks (PLN)

From the moment you arrive at the NBOA Business Officer Institute, you are connected to a network of supportive colleagues from across the United States and the globe. On the first day, you and other attendees divide into groups of eight to 12 business office colleagues, forming your professional learning network (PLN). This connection continues throughout the program, as you attend events both on and off the campus, professional development sessions and a variety of other programming with members of your group. Your fellow participants will serve as a unique network of friends, resources, and future professional contacts.



Program Details

The five-day NBOA Business Officer Institute provides you with a unique, immersive learning experience that covers the essential topics that you need to know as business officer — from accounting and finance to human resources and technology. Taught by a team of experienced business officers and experts in law, accounting and endowments and more, you'll leave this Institute with the tools and resources you need to be successful at your school.

Set in an intimate environment that's perfect for networking and creating lasting connections with colleagues from across the country, the Institute provides you with a mix of general sessions and concurrent programming, allowing you to customize your schedule to fit the areas where you wish to focus.

Topics include:

- Budgeting and Financial Modeling
- Information Technology and the Business Office
- Facilities Management and Capital Projects
- Financial Aid, Enrollment Management and Collections
- Risk Management and Insurance Overview
- School Safety and Security
- Endowment Management
- Leadership Styles Using the DiSC Personality Profile
- Endowments, Campaigns, and Giving
- Financial Sustainability: The Independent School Financial Position
- Issuing and Managing Debt: What's Right for Your School?
- Legal Issues in Human Resources for Independent Schools
- Not-for-Profit Tax Considerations for Independent Schools

Business Officer Institute Faculty

Frank Aloise
Chief Financial Officer
Springside Chestnut Hill Academy
Philadelphia, PA

Deborah Anderson
Business Manager
Foxcroft School
Middleburg, VA

Sam Goldfischer
Director of Business and Finance
Newark Academy
Livingston NJ

Donna Pacchioni
Retiring Chief Financial Officer
Hawken School
Gates Mills, OH

Dean Sidell
Associate Head of School for Finance and Operations
Tower School
Marblehead, MA

Ann Marie Tidona
Director of Finance
Friends Academy
Locust Valley, NY

BOI Host

Shaun Buckler
Director of Finance and Operations
Moses Brown School
(Host school)
Providence, RI

NBOA Staff Faculty

Jeff Shields
President and CEO
Washington, DC

Jennifer Hillen
Vice President, Professional Development and Business Affairs
Nashville, TN

Grace Lee
Vice President, Legal Affairs
Arlington, VA

Mary Kay Markunas
Director, Research and Member Resources
Glen Ellyn, IL

➔ **View complete program online**

www.nboa.org/boi

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Moses Brown School



**Register
today!**
Early-bird
registration ends
May 6

“ The Business Officer Institute was truly an amazing experience. I learned a lot and loved connecting with other business officers who face the same issues I do. It was a great venue for camaraderie and idea sharing. I was able to build a network of colleagues whom I will keep in touch with and reach out to regularly. I would highly recommend this program to new business officers, and I would consider going through the program again in a few years.”

Kate Ferini, Montessori de Terra Linda, San Rafael, CA

www.nboa.org/boi



20 YEARS 1998-2018

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