

## **The Business Office Engagement Calendar**

***Scott Barron, School Growth***

An organizationally healthy school has significant competitive advantages. The business office can contribute to growth and engagement by prioritizing disciplined relationship building with the key influencers across the campus: Head of School, Board, Enrollment, Development, Academic Leaders, Faculty, and Parents.

The most valuable assets your school has are the internal and external relationships that drive revenue and mission delivery. In this roundtable session, we will share our Business Office Engagement Calendar, with practical steps you can take throughout the upcoming school year to cultivate greater trust and collaboration.

## **Best Practices in Gift Acceptance: Not All Gifts Are Created Equal**

***Monika Pelz and Bryan Vencill, Armanino***

What is a gift? What is more than a gift? Are you comfortable with how the Financial Accounting Standards Board (FASB) has clarified the framework for determining how contributions received and contributions made should be classified — whether as conditional or unconditional contributions? This roundtable will help demystify this process.

## **15 Tips for Saving Time in the Business Office**

***Carolyn Hapeman, Westtown School***

Efficiency checkup time! Is your Business Office being as efficient as possible? Stop by for a quick checkup and to share your own efficiency ideas.

## **Cooperative Retirement Plan**

***Marcie Carroll and Buzz Hartsig, Carroll Consultants | Cafaro Greenleaf***

This roundtable will help you understand what a Cooperative Retirement Plan would look like for PAISBOA member schools and universities. Discussions will center on The Pros and Cons, What's the Same and What's Different, and Why Your School Would Want to Join this Cooperative Retirement Plan.

## **Don't Be Surprised: How to Build an Infrastructure Renewal Budgeting Tool**

***Dan Crowley and Alex Pearson, Friends Central School***

Join a roundtable discussion about how to build a budgeting tool around equipment life cycles and Cisco milestones. Learn how to use sheets to normalize data, create pivot tables, and track moving projects.

## **Current Legal Issues in Independent Schools**

***Susan Guerette, Fisher Phillips***

The business office manages complaints, compliance, and concerns. Join us to increase your awareness of legal issues facing our schools.

#### **The One-Person Business Office**

***Gail Crane, Gwynedd Friends School***

***Cheryl Hammond Hopewell, Haverford Friends School***

***Rachel Tilney, PAISBOA***

From accounts payable to payroll, human resources to physical plant, and beyond, how can a team of one in the business office keep it all together? What resources are available to save you time? Are there things you can delegate, table, postpone, or stop doing altogether?

This interactive roundtable will share tips, advice, suggestions, and pitfalls to look out for when you are a business office of one and have to do it all! Come prepared to learn and share strategies to manage your many responsibilities.

#### **Strategies for a Healthier You**

***Joan Barone, PAISBOA Health Benefit Trust***

Join this roundtable discussion on how the PAISBOA Health Benefit Trust can save your school time and money while providing great benefits to your employees.

#### **Master Planning**

***Adam Wojtelwicz, The Shipley School***

This roundtable will give a general overview of the Shipley Master Plan process, which was used between 2008 and 2015 to complete a significant renovation of the Shipley School's upper campus. Also, the session will talk about a subsequent master plan update and space allocation report, which will help guide future capital projects and ensure the campus is moving in lockstep with the program needs.