

General Session Panel Discussion

This is not a Drill: Emergency Preparedness and Recovery in the wake of the California Wildfires and Mudslide. Panelists will share their experiences and lessons learned and discuss what worked, what didn't and what they are thinking about now. Sandi Pierce, Assistant Head for Finance & Operations, Cate School, Jennifer Macias, Director of Finance & Operations, Sonoma Country Day School, Don Cook, Director of Finance & Operations, Crane Country Day School,

Breakout Sessions

1. **Contracts, Contracts, Contracts** – Best practices in reviewing and establishing contracts with vendors. Topics will include: Language to look out for, indemnification clauses, independent contractors, Insurance COIs, waivers, subrogation, and streamlining the work load in the Business Office. Presenters: Daniel Rothbauer, COFO, Curtis School, Heather DeBlanc, Liebert, Cassidy, Whitmore, Darrow Milgrim, AJ Gallagher & Co.
2. **Picturing the Future: Strategic Planning 2018** - How do you feel when you hear the phrase "strategic planning process"? What have those processes been like at your school? What is the role of the CFO and business office in setting long term vision? Come hear about the visual participatory process undertaken by Hillbrook School in Los Gatos, CA and how the use of graphic facilitation as a way to design an experience that mirrored the school's values led to the creation of a strategic plan (Vision 2020) that is central to the way the CFO measures and communicates the school's priorities. Giselle Chow, Graphic Facilitator and Margaret Randazzo, CFO at Hillbrook School
3. **Great Places to Work: What California Schools are Doing to Add Value to Staff and Faculty Employment** - A panel discussion of non-salary benefits in independent schools including housing, Student Loan Payment support, on-campus childcare. Panel: Terry Lee, Associate Head of School, The Nueva School, Bill Silver former CFO, Menlo School, Sandi Pierce, Assistant Headmaster, Cate School, Aaron Levine, CFO French American International School, San Francisco – Moderator: Julia Yzaguirre, CFO, The Center for Early Education
4. **Grading Independent Schools? Where Does Your School Stand** Financial officers – along with the board and executive leadership teams- constantly want to know how their school is performing, not only against their own financial goals but also in comparison to similar schools. Get an in-depth look at how schools are assessed against their peers, examine a matrix of financial ratios and review summary information on internal and external benchmarks. Lisa Turchan, CFO, The Buckley School and Dirk ten Grotenhuis, First Republic Bank

5. **HR California: How Does Your School Handle It All?** As independent schools in California we are all faced with the same legal and compliance environment. As we navigate more and more complex regulations, how do we ensure that our schools are compliant while meeting the needs of employees and considering school culture? Who handles compliance, employee issues, and recruitment and hiring at your school? Does your school need an HR Director, a more transactional person, HR outsourced resources? How does a school evaluate and determine who or what they need? Beth Lee, Business Director, Peninsula School
6. **Financial Assistance 2018-19: Inclusion and Equity Issues** - How one school approaches its financial assistance process to make it more inclusive and approachable. How do we move beyond tuition and ensure that financial assistance addresses the cost of the full experience at our schools? Cristina Casacuberta, Director of Finance and Operations at The Hamlin School