

**Catalyst: Strengthening Your School's Operations & Finances**  
**Dallas, TX | November 11-12, 2025**  
**Religious vs. Non-Religious for Title Funding**

Keynote	Non-Religious	Religious
#1 Potential & Pitfalls of AI	100%	0%
#2 Transforming Good to Great: Key Strategies for Excellence	100%	0%
#3 Beyond the Ask: Accelerating Your Annual Fund with Strategy, Story and Stewardship	100%	0%
Workshops	Non-Religious	Religious
Managing Emerging Risks for Schools	100%	0%
A Strategic Financial Plan that Works	100%	0%
Strategic Human Resources	100%	0%
Funding Expansion while Preserving Annual Fundraising	100%	0%
Organizational Rest	100%	0%
Beyond the Balance Sheet: Understanding Poverty's Impact on School Culture and Strategy	100%	0%
The Practical Applications of AI in Your School	100%	0%
Fundraising 2.0	100%	0%
Proactive Recruitment	100%	0%
Level Up Your Impact: Strategic Fundraising for Long-Term Success	100%	0%
Executive Coaching	100%	0%
Asking the Right Questions	100%	0%
Building a Sustainable Financial Model	100%	0%
Seamless Transitions	100%	0%
The Reluctant Fundraiser	100%	0%
A New Approach to Onboarding Teachers	100%	0%
Mission Possible: Building a Fully Funded Private School Without Full Tuition	100%	0%
<b>TOTAL AVERAGE</b>	<b>100%</b>	<b>0%</b>



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Day 1		
Time	Title	Description
6:30 PM CT	Potential & Pitfalls of AI *Pete Marra	Artificial Intelligence is reshaping our world faster than most of us can keep up. Pete Marra of the Colson Center explores the promise AI holds for transforming how we live, work, and learn, alongside the very real risks it introduces to the future of education.
8:00 PM CT	END OF DAY	
Day 2		
8:30 AM CT	Transforming Good to Great: Key Strategies for Excellence *Dr. Milton Gonzalez	Explore the essential strategies that elevate organizations from good to great. This session focuses on the disciplined practices, leadership qualities, and cultural shifts necessary to achieve and sustain exceptional performance.
9:30 AM CT	BREAK	
10:00 AM CT	Managing Emerging Risks *Eric Price	This essential workshop equips school business administrators with practical strategies for identifying and managing emerging risks facing today's independent and private schools. Participants will examine real-world case studies and gain insights into legal, financial, operational, and reputational threats — ranging from cybersecurity to cultural challenges.
	A Strategic Financial Plan that Works *John Klingstedt	Financial planning is meant to be a process to help in decision making for your future, not a final destination. This session will focus on financial planning best practices, as well as discussing how to make a financial plan that can be used and understood by all the leaders of an organization.
	Strategic HR: Transforming HR from Overlooked to Valued *Chris Loncar	Historically focused on compliance, payroll, and benefits, HR now can address labor shortages, regulatory challenges, and turnover, becoming a strategic partner in organizational success. This session explores how HR can engage decision-makers, demonstrate its value, and evolve into a key component of organizational strategy.
	Funding Expansion while Preserving Annual Fundraising *Schuyler Lehman	The need for capital often creates stress for annual operational fundraising. How can both succeed simultaneously, especially when development staff are already stretched thin? This session will help Christian school leaders think through the implications of raising capital and better plan for overall financial health.
	Creating a Culture of Rest for Sustainable Performance *Mike Allen	We all know that the work never stops unless you intentionally set boundaries. So how do you make it stop? In this session, Mike will share practical strategies to build a workplace culture that values rest and balance, helping employees stay healthy,



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		energized, and sustainably committed to excellence.
	Beyond the Balance Sheet: Understanding Poverty's Impact on School Culture and Strategy *Dr. Justina Jenkins	Poverty and trauma do not only affect academic performance they influence school operations, staff retention, and long-term sustainability. This session will equip school leaders with tools to build trauma-responsive systems and budgets that support student well-being without compromising financial stewardship. Discover how your leadership decisions can either mitigate or magnify the effects of poverty within your school community.
<b>11:00 AM CT</b>	<b>BREAK</b>	
11:30 AM CT	The Practical Applications of AI in Your School *Pete Marra	Artificial Intelligence is a powerful tool that is already changing the way schools operate. This session focuses on concrete AI applications, including demonstrations of AI tools, how to write and use AI prompts, along with ways to streamline workflows, and support schools.
	Beyond the Budget: Strategic Finance for Sustainable Impact *Schuyler Lehman	TBD
	Proactive Recruitment *Chris Loncar	Recruitment remains a critical priority for today's school leaders. With sudden turnover, constrained budgets, and a limited pool of missionally aligned candidates, many organizations find themselves stuck in a cycle of reactive hiring. This session will explore how to break that cycle by developing forward-looking strategies that position your school to attract and retain high-quality, mission-fit talent—not just for today's vacancies, but for the future needs of your school.
	Level Up Your Impact: Strategic Fundraising for Long-Term Success *Derric Bakker	Designed for school leaders and advancement professionals ready to “level-up” their fundraising, this session focuses on moving beyond short-term tactics to develop a more strategic, mission-driven annual giving program. Participants will explore how to reframe their approach from transactional fundraising to a more intentional, year-round engagement model that fosters deeper connections and long-term support. You will also learn how to communicate with greater clarity and purpose, inspire broader involvement, and align your outreach with your institution's core values. Through practical insights and actionable takeaways, you'll gain a new understanding that will help you raise more money, boost participation, and fundraise with greater confidence. Perfect for those seeking to build momentum, cultivate trust, and drive meaningful results.



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	Executive Coaching: what it is, what it isn't, and why we ought to be good at it *Chad McNatt	As leaders, our people are our greatest resource. What looks like a performance issue may actually be an opportunity for growth. This session explores how executive coaching can help leaders break through obstacles, foster ownership, and create a culture of learning and dialogue. Learn a simple coaching model to help individuals — whether you supervise them or not — thrive in their roles and contribute more effectively to the team.
	Kingdom Culture: Building School Communities That Thrive *Dr. Shailendra Thomas	What does it take to build a school culture that is transformative, sustainable, and true to your mission — especially in urban or high-need communities? This workshop explores how to align faculty, staff, students, parents, and core systems like curriculum, hiring, and professional development to create a unified environment. We'll also discuss strategies for supporting students who need academic remediation, social-emotional support, and physical care, ensuring every child is seen, supported, and equipped to thrive.
<b>12:30 PM CT</b>	<b>LUNCH</b>	
1:30 PM CT	Beyond the Ask: Accelerating Your Annual Fund with Strategy, Story and Stewardship *Derric Bakker	Designed for school leaders and advancement professionals ready to grow their annual fund, this session shows how to move beyond transactional tactics and build a mission-centered strategy. Learn to shift from a one-time “annual ask” to a year-round approach that deepens donor relationships, aligns messaging with your school’s values, and mobilizes your entire community. Walk away with practical tools, real examples, and clear next steps to strengthen giving and increase engagement.
<b>2:45 PM CT</b>	<b>BREAK</b>	
3:00 PM CT	Asking the Right Questions *David Buckles	As leaders, we're often expected to have the answers—but in areas like budgeting, tuition decisions, benefits planning, and capital campaigns, asking the right questions is far more powerful than having the right answers too soon. This interactive workshop will guide you through a practical exercise designed to uncover the critical questions that drive meaningful, mission-aligned decisions. You'll leave with actionable takeaways to help realign your leadership, team, and school with your core mission, vision, and values.
	Building a Sustainable Financial Model *Brandon Allen	This workshop examines current financial and fundraising trends in private education. What does the future of independent school operations look like? Should fundraising be considered essential or optional? Will schools be able to meet expenses — and will families be able to afford tuition in the years ahead? Using year-over-year





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		data, this session explores potential solutions for building a more sustainable future.
	Seamless Transitions *Brian Jensen	Ensuring leadership continuity and a strong talent pipeline is essential to the long-term health of your school. This interactive workshop provides a framework for developing and implementing a comprehensive succession plan. We'll demystify succession planning, offering practical and scalable strategies to ensure the continued success of your vital work. The topics covered will include identifying key roles, the role of the board, cross-training, developing internal talent, and preparing for the unexpected. Learn how to safeguard your school's mission and legacy with a thoughtful and achievable succession plan, even with limited resources.
	The Reluctant Fundraiser *Steve Bult	As Head of School, I stepped into a role that demanded something I neither felt equipped for nor eager to tackle — fundraising. I was an educator, not a fundraiser. Yet as the construction plans at Wheaton Academy took shape, I had no choice but to embrace this part of the job. Over the past five years, I've gone from a reluctant fundraiser to seeing it as an opportunity to invite others to meaningfully invest in their community. I'm excited to share what I've learned with you.
	A New Approach to Teacher Onboarding *Brian Dougherty	The most important decisions we make as school leaders revolve around the individuals we hire as teachers. Today, teachers come from a variety of backgrounds with differing levels of training, experience, and educational philosophy. Hiring, developing, and retaining skilled and dedicated teachers is critical to the success of both leaders and institutions. Effective schools cultivate a clear and unified culture that aligns with their mission and operates consistently. Strong school-based training for new teachers is essential to achieving this goal. In this workshop, we will share one school's approach to new teacher onboarding and first-year training, designed to ensure that new hires understand and implement the school's mission, embrace its educational philosophy, and integrate smoothly into its unique culture.
	Mission Possible: Building a Fully Funded Christian School Without Full Tuition *Ashanti Williams	This session is designed for school leaders and development professionals serving communities where affordability is a barrier. Learn proven strategies to build donor trust, communicate value, and fund operational needs through creative and relationship-focused development approaches. Leave with practical tools to grow a resilient fundraising program driven by impact and results.
<b>4:00 PM CT</b>	<b>END OF DAY</b>	