

10TH ANNUAL Charter School Risk Management Roundtable



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SAVE THE DATE...

For the 10th Annual New York City Charter School Risk Management Seminar.

Gallagher's Education Practice will bring together experts for an insightful and interactive dialogue with Charter School leaders that are tailored to top issues facing New York Charter Schools in 2024. Please join us as we welcome our peers along with our panel of presenters from Northeast Charter Schools Network, Cohen Schneider Law, P.C., Thompson Hine LLP, Charter School Business Management, Inc., PKF O'Connor Davies LLP, and our Gallagher Education Practice Leaders.



Click on the presenters to learn more about them!

Agenda

Guest Arrival and Registration	8:30am–9:00am
Introduction - Student Recruitment and Enrollment <i>Anna Hall, Northeast Charter Schools Network</i>	9:00am–9:30am
2024 New York Charter School Legal Update <i>Cliff Schneider, Cohen Schneider Law, P.C.</i>	9:30am–10:00am
Charter School Employee Benefits Hot Topics <i>Tim Brown and Beth Mandel, Thompson Hine LLP</i>	10:10am–10:40am
Mitigating Risk Via Forecasting <i>Raj Thakkar, Charter School Business Management (CSBM)</i>	10:40am–11:10am
NY Charter School Accounting & Auditing Update <i>Gus Saliba, PKF O'Connor Davies LLP</i>	11:20am–11:50am
2024 Property & Liability Insurance Market Update <i>Brandon Cole, Gallagher Education Practice</i>	11:50am–12:20pm
Charter School Networking Lunch	12:20pm–1:30pm

February 8, 2024

8:30am to 1:30pm EST

[Registration/Check-in begins at 8:00am]

300 Madison Avenue,
28th Floor, New York,
NY 10017

FREE REGISTRATION!
SIGN-UP HERE TODAY

*Please NOTE this event is CLE & CPE credit eligible

For additional information, please contact:

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Gallagher Education Practice

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SPEAKER BIOGRAPHIES

ANNA HALL *Northeast Charter Schools Network*



Anna Hall serves as the CEO for the Northeast Charter Schools Network (NECSN), the umbrella organization for both the New York and Connecticut Charter Schools Associations. These state charter associations provide school support and advocacy to almost 400 charter schools serving over 200,000 students in primarily underserved communities. Before coming to NECSN, Anna served for almost a decade as the Chief Operating Officer for Uncommon Schools in Boston, Rochester, and Troy. In this capacity, Anna led Operations across 13 high-performing charter schools, serving over 5,000 students. Anna began her career in education as a Teach for America Corps Member in Eastern North Carolina as a 7th-grade teacher. She holds a BA in Politics from Princeton University, and a Master's in Public Policy from the Harvard Kennedy School.

CLIFF SCHNEIDER *Cohen Schneider Law, P.C.*



Cliff focuses his practice on advising individuals and organizations that are innovating in the areas of education, business, and the non-profit sector. Whether it's a school, a start-up business, an existing business, or a social enterprise, Cliff guides his clients through projects big and small and the many twists and turns experienced along the way. Drawing from 15 years of experience in which he serves many as their outside general counsel and close trusted advisor, Cliff's cross-disciplinary approach to practice spans a variety of areas of law to provide clients with a team member that possesses the depth and breadth required to implement legal strategies that support clients as they pursue their passions, purposes, and interests.

TIM BROWN *Thompson Hine LLP*



Tim is a partner in the firm's Employee Benefits & Executive Compensation practice group. His practice focuses on advising large national and global private and public companies on qualified retirement plans, health and welfare plans, fiduciary compliance, and executive compensation. Tim has significant experience with the analysis of benefit issues and liabilities in corporate mergers and acquisitions, creation, maintenance and termination of tax-qualified retirement plans and master trusts and development of non-qualified executive compensation arrangements. He is a trusted advisor to companies on employee benefits compliance matters, including fiduciary governance and oversight, law and regulatory changes impacting benefit programs, compliance with SEC rules affecting the operation of benefit plans, IRS and Department of Labor plan audits, voluntary corrective actions under regulatory relief programs and governmental reporting obligations.

BETH MANDEL *Thompson Hine LLP*



Beth is a partner in the Employee Benefits & Executive Compensation practice in Cincinnati. She assists employers with the design, implementation and operation of welfare and fringe benefit plans. She advises on Internal Revenue Code, ERISA, COBRA, HIPAA and Affordable Care Act (ACA) compliance and assists clients in navigating the increasingly complex web of federal and state benefit regulations. Her day-to-day work includes counseling clients on the expanding group health plan transparency and reporting requirements, addressing benefit plan considerations related to hot-button issues like reproductive health care and gender affirming care, and helping clients work through more traditional taxation, ERISA, privacy and ACA issues.

RAJ THAKKAR *Charter School Business Management (CSBM)*



Raj Thakkar is the founder and chief executive officer of Charter School Business Management (CSBM) as well as FOREsight Financial Services for Good. Widely regarded as an expert on nonprofit and charter school finance, Raj has presented countless financial best practices workshops across the country. He recently wrote his first book, fiscally seCURE: prepare, protect & propel YOUR CHARTER SCHOOL WITH RESPONSIBLE FINANCIAL MANAGEMENT.

GUS SALIBA *PKF O'Connor Davies LLP*



Gus Saliba has over 30 years of public accounting experience in the not-for-profit sector with a specialty in educational organizations, including charter schools. He also is actively involved in providing not-for-profit organizations with a wide range of accounting, auditing and consulting services. His areas of expertise include audit planning, accounting, internal control reviews, implementation of IRS form 990 guidelines and providing board education and governance advice. Gus currently provides auditing services to over 100 not-for-profit clients, including over 70 charter schools primarily in the Northeast and 10 charter management organizations at both the national and state levels.

BRANDON COLE *Gallagher Education Practice*



Brandon is the national program leader for Arthur J. Gallagher's Scholastic First insurance Program and over 14 years of experience in the insurance industry in general. He is a client advocate who oversees day to day client services for accounts with a focus on Non-profit and Scholastic clients. Brandon has earned many designations throughout his time in the insurance industry including: Certified Risk Manager (CRM), Certified Insurance Counselor (CIC), Certified School Risk Manager (CSR), Chartered Property Casualty Underwriter (CPCU), Associate in Risk Management (ARM) and Registered Professional Liability Underwriter (RPLU). He has also been recognized as a "Power Broker" by Risk & Insurance Magazine in 2014, 2015, 2016, 2017 and 2018 and was the winner of the "Breakout Award" in 2018 from Business Insurance Magazine. He has also been recognized as a "Difference Maker by The National Alliance for Insurance Education & Research.