Avoiding Partnership Pitfalls

ACIS Conference 2020

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Introductions and Warm-Up

In the chat, please type where you are and one question you hope we answer today!

Learning Agenda

- Common Partnership Pitfalls

- Understanding Roles and Responsibilities

- Working Agreements

- Recognizing Boundary Crossing

- Communication Strategies

- Problem Solving

- Case Study

- Debrief

What is a Pitfall and Why Does it Matter?

pitfall, noun,
A hidden or unsuspected danger or difficulty.

Common Pitfalls

- Unclear working agreements
- Communication issues
- Variable or lack of knowledge of governance best practices
- Leadership styles
- Pressures from the board
- Pressures from the community
- Legal and media issues
- Difference in experience and years at the school
- Trust

- Issues with a major donor
- Parent issues with the head of school, teachers, and/or program
- Bylaws that are outdated
- Chair's child having issues at the school
- Unexpected transitions in either position
- Chair or head of school having a lapse in judgement
- Issues in the personal lives of either the chair or the head of school
- Differing political views

Blinders and Biases

- Personal agendas

- Ambushes, distractions, and opinions from the board or parents that influence your thinking

- Being a parent and a trustee

Common Emotional Triggers

- Fear
- Change of leadership
- Financial pressures
- Personal issues
- Lack of governance knowledge
- Uncertain times
- Politics
- Worrying about your children

Boundary Crossing

The board is boundary crossing when it:

- Focuses on tactics rather than strategy.

- Suggests specific program improvements as opposed to policy changes

- Has executive sessions without the head and is reluctant to inform him/her of the outcome

- Makes budget changes without input from staff leadership

- Becomes involved in parent or staff issues

How Do We Move Forward?

- Understand Roles and Responsibilities

- Establish Working Agreements

- Nurture Clear Communication

- Engage in Collaborative Problem Solving

Going into the partnership—you should know:

1. Bylaws

2. Parent Handbook

3. School Processes and Guidelines

4. School Budgeting

5. Organizational Chart

6. The history of the board's work and the school
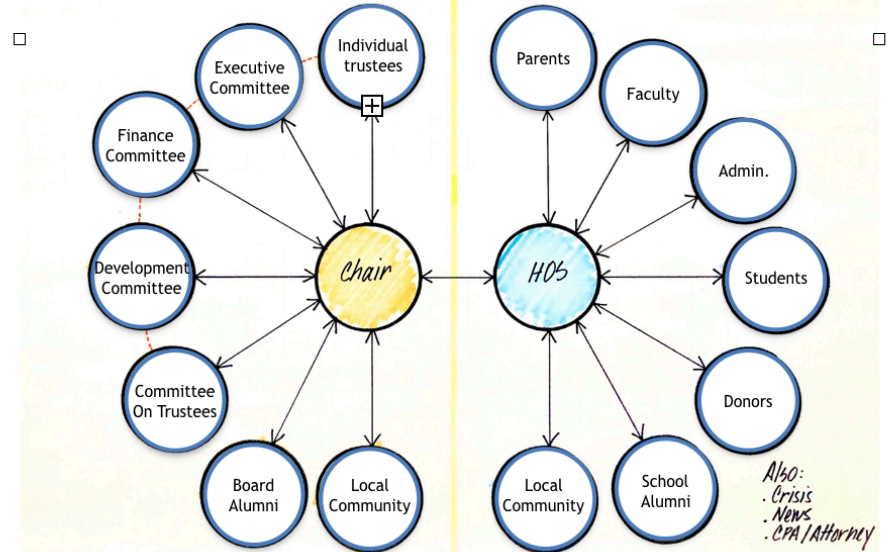
Understand Healthy Boundaries
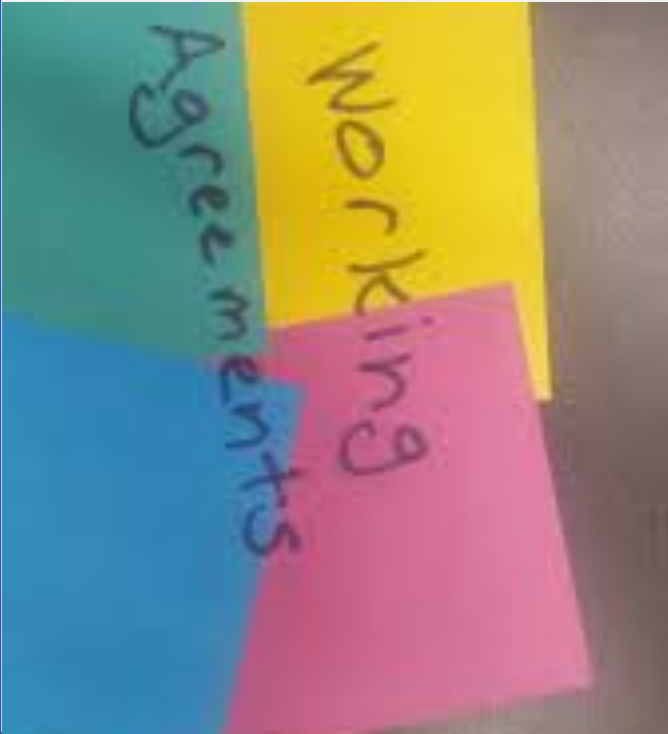
Understand Roles and Responsibilities

Chair

- Leads the board

- Collaborates with the head of school

- Creates and nurtures the mission, vision and values of the school and refines as necessary

- Guides long-term strategy in collaboration with HOS

- Hires, supports, evaluates, and, empowers the head of school.

- Ensures long-term financial sustainability

- Selects, recruits, and orients new trustees.

Head of School

- Leads the school

- Collaborates with the chair and board

- Brings the mission, vision and values to life through experience, programs, and school policies

- Implements an operational plan to achieve long-term strategy

- Hires, supervises, evaluates and motivates staff.

- Develops develops and oversees annual operational budget.

- Manages the day-to-day operations of the school.

Understand Working Agreements A Sample:

- Agree to understand each other's roles and responsibilities

- Agree that you are dedicated to the sustainability and success of the school and its community

- Agree to set regularly scheduled meetings to discuss school and board business

- Agree that neither will withhold information from the other

- Agree that, while you strive for excellence, neither of you are perfect—making mistakes is part of the process

- Agree that you will have each others back

- Agree you will respect each others time

- Agree to listen deeply to each other's point of view

- Agree to coach each other in private, and in public to have a united front

- Agree that you are always available to each other
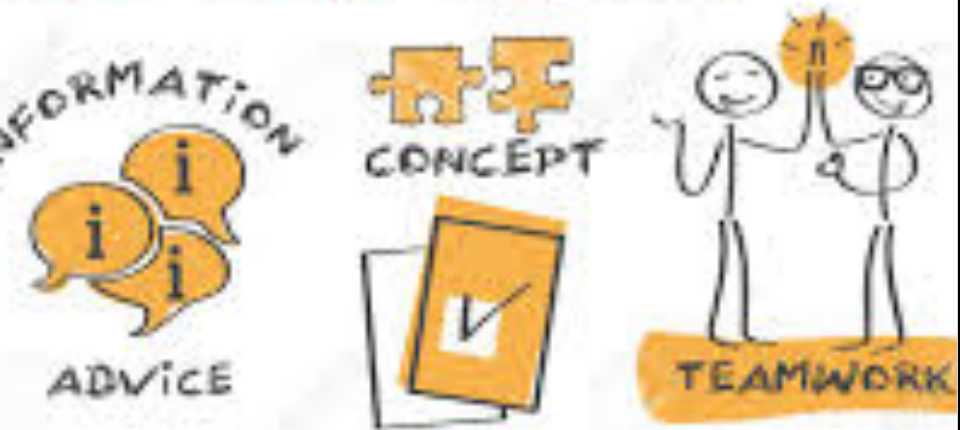
- Agree to confidentiality

Understand Good Communication

- Ask questions
- Create regular feedback loops
- Understand preferred communication styles: [What's Your Communication Style?](#)
- Listen and encourage input
- Affirm with actions

Understand the Power of Problem Solving

Perceptions/Facts:
What are the facts? What do we know? What do we not know?

Impressions/Intuitive:
What are the possibilities?

Analysis:
What are the logical consequences of acting on each option?

Feeling:
What are the human consequences of acting on each option, and what do I care about?

Understand What Your Partnership Can Achieve

- Ensure a thriving and sustainable school
- Create a unique space for learning and sharing that launches students in to the rest of their lives
- Build a strong community where everyone belongs
- Enhance the school's reputation
- Put a rung on the ladder for others to climb higher
- Build something that is enduring and serves the greater good

Applying the Concepts

Case Study: The Head of School and Board Chair Partnership

Events and Resources

- **ACIS**: acisschools.com
- **NAIS Event:** Planning for a Sustainable Future: Strategic Conversations for Heads and Boards Webinar October 8 at 2pm
- **NAIS Event:** Leadership through Partnership Institute October 10 and October 11
- **Book:** NAIS 2020 – 2021 Trendbook
- **Book:** Board Chair Handbook
- **Book:** Trustee Handbook
- **Podcast:** Trustee Table Podcast
- **Online Courses:** Governance Program

Thank you for joining us

Please contact us if you have additional questions:

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