Governing with Purpose

New Trustee Orientation



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Our Learning Agenda

1. What changes when I become a trustee?
2. How do effective boards govern?
3. How do trustees steward their schools?
4. How do I respond when governance gets complicated?

CHANGE - TURN AND TALK • 8 MINUTES

What changes when you become a trustee?

You have cared about your school for years. Now you have joined its board. What changes about the way you listen, speak, decide, and act?

DISCUSS

1. What responsibilities are new?

2. What habits or assumptions might you need to leave behind?

MINDSET SHIFT

- From advocating for a particular interest → stewarding the whole school
- From solving immediate problems → protecting the long-term future
- From acting as an individual → exercising collective authority

Boards must protect the future from the present.

A trustee's question is not

only

"What needs attention now?"

but also

"What must endure?"



Mission: The Guidepost and Guardrail



- **Guidepost**: What future are we trying to create?
- **Guardrail**: Which decisions are consistent with our purpose?
- **Accountability**: How will we know we are advancing mission?

Three Fiduciary Duties

CARE

Be informed, prepared, and diligent.

IN PRACTICE

Review board goals and ensure they are mission-aligned.

LOYALTY

Put the school's interests ahead of personal interests.

IN PRACTICE

Puts the school's interests first, even when a decision may not benefit their own child.

OBEDIENCE

Honor mission and applicable legal obligations.

IN PRACTICE

Checks whether a proposed program advances mission and meets legal requirements.

A Board Governs; Trustees Contribute

- The board acts collectively through its authorized decisions.
- Individual trustees have no independent authority to direct staff.
- The head leads school operations within board-approved policies and strategy.
- Trustees support decisions and uphold confidentiality.

The Governance Dichotomy: Govern & Support

THE BOARD AS A WHOLE · GOVERNS

- Determines mission and purpose
- Hires, supports, and evaluates the head
- Sets strategic direction
- Ensures resources and financial oversight
- Builds an effective board
- Ensures legal and ethical integrity

INDIVIDUAL TRUSTEES · SUPPORT

- Prepare and participate fully
- Support the school financially as able
- Put school interests ahead of personal interests
- Honor collective board decisions
- Support the head and school in the community
- Maintain confidentiality; avoid surprises

Collective authority ≠ individual authority

RESPOND - SMALL-GROUP DISCUSSION • 15 MINUTES

Scenario 1: *Whose decision is it?*

A · CONCERNED PARENT
A parent asks you to change an administrative decision.

B · HELPFUL TRUSTEE
A trustee offers to redesign enrollment strategy directly with the admissions director.

C · BUDGET DECISION
At the Finance Committee, a trustee questions a proposed administrative hire.

DISCUSS ALL THREE

1. Is this governance, support, or management?

2. What should the trustee do—or not do?

Begin with A, then B, then C.

A Useful Boundary Test

- Is this a mission, policy, strategy, or accountability question?
- Are we directing how staff should execute a decision?
- Have we empowered the head while preserving board oversight?

GOVERN - HOW BOARDS WORK



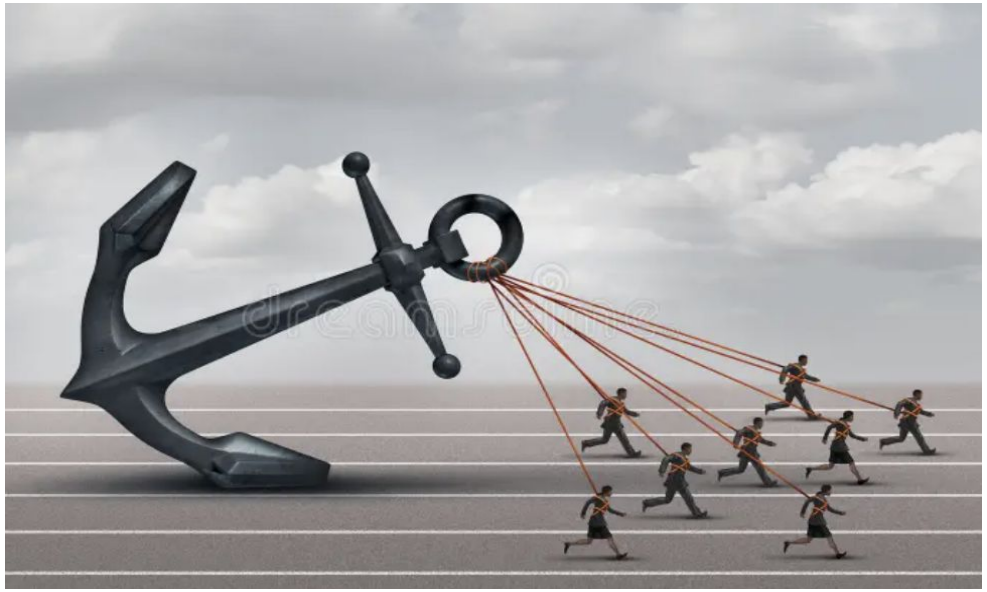
ACIS • NEW TRUSTEE ORIENTATION

Structure Should Serve the Work

- Standing committees provide oversight of essential governance responsibilities.
- Committees and task forces should align with strategic priorities and emerging needs.
- Clear charters define purpose, authority, accountability, and reporting.
- Board structures should evolve as the school's priorities change.

KNOWING ≠ DOING

A board can know what good governance looks like
and still struggle to govern well.



Good governance is more than good structure

PURPOSE	PROCESS	PEOPLE
Why we govern	How we govern	How we behave

Board culture is shaped by the norms trustees establish, model, and uphold over time.

Non-Negotiable Norms for Boards

- **Preparedness:** Come to the meeting ready to engage with the agenda
- **Avoid Personal Agendas:** Do not hold the group hostage to any personal agenda, and employ an 80/20 decision-making principle—do we have adequate information to proceed?
- **Confidentiality:** Create an environment where people can freely share without fear
- **One Voice:** Leave with messages that present a united front
- **Climate:** Grapple with tough issues/challenges while assuming good intent and seeking to understand
- **Deliberations:** Base decisions on as much information-gathering as possible
- **Philanthropy/ Financial Support:** Giving and *friendraising*

Board culture in action: The norms we create

A trustee arrives unprepared, dominates discussion, and then tells parents that the board "got the decision wrong."

DISCUSS

1. Which board norms are being undermined?

2. How might fellow trustees reinforce those norms constructively?

Three ways effective boards think

- **Fiduciary: Are we protecting assets, integrity, and mission?**
- **Strategic: Where are we going, and how will we get there?**
- **Generative: What is the real question we should be asking?**

Adapted from Chait, Ryan, and Taylor, Governance as Leadership (2005).

What Does It Mean to Steward a School?

Trustees are responsible not only for the decisions their boards make today, but also for the conditions those decisions create for the school's future.

MISSION

Are our decisions advancing our purpose?

Ensure the school lives its mission and remains true to its values, character, and educational commitments.

INSTITUTION

Are we strengthening the school's long-term health?

Protect and build the school's financial health, operational capacity, legal compliance, and reputation.



LEADERSHIP

Are we creating the conditions for leaders to succeed?

Support current and future leadership, including the head and the broader leadership team, through clear expectations, trust, and ongoing development.

FUTURE

Are we preparing the school to adapt and thrive?

Make decisions that position the school to meet future opportunities and challenges while serving multiple generations of students.

A THRIVING SCHOOL, TODAY AND FOR GENERATIONS TO COME

A Shared Leadership Ecosystem

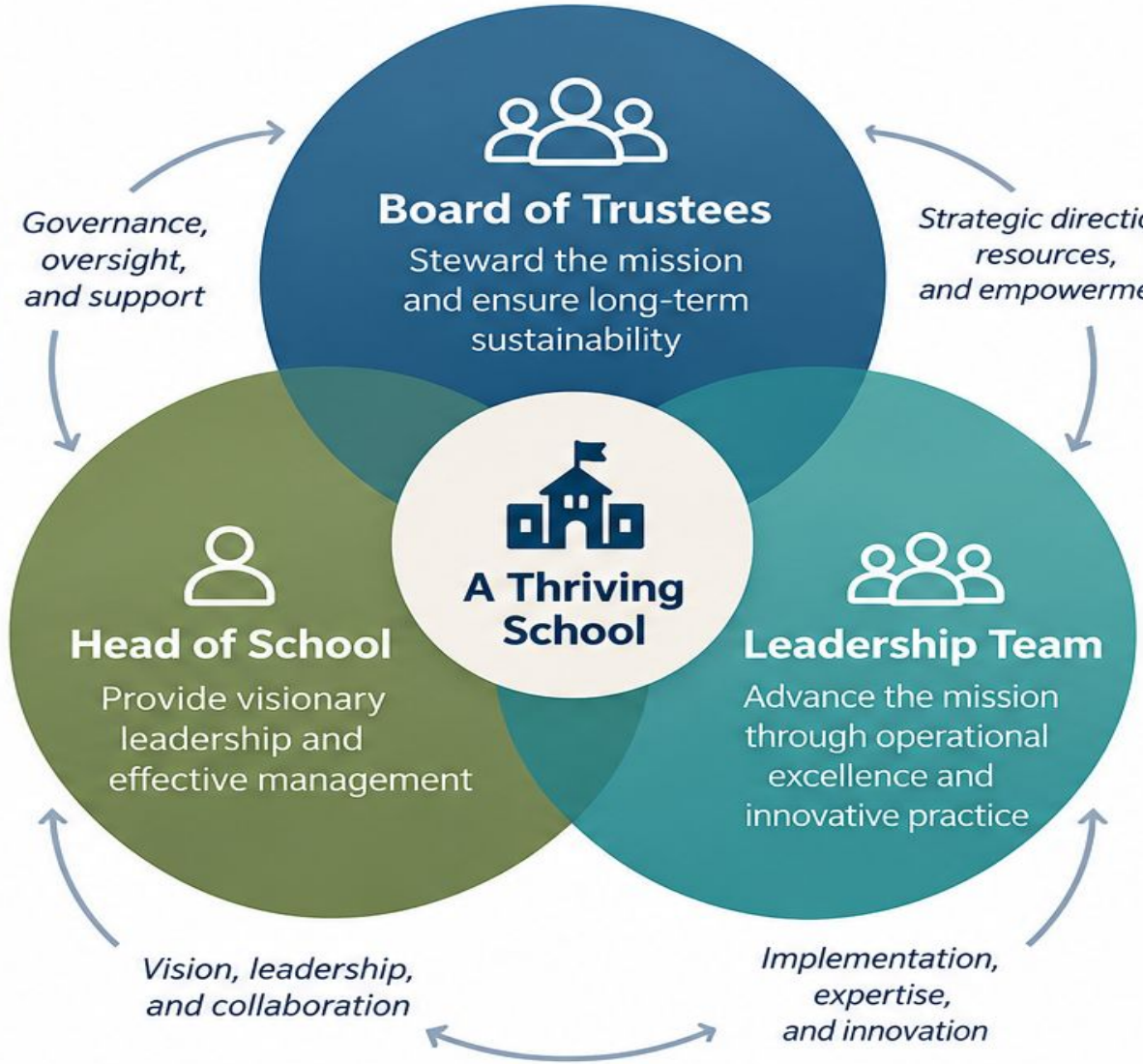
Different roles. A common purpose. A stronger school.

Board of Trustees

- Set strategic direction
- Ensure financial health
- Support the head of school
- Uphold legal and ethical responsibilities
- Advocate for the school's mission

Head of School

- Lead the school's vision and direction
- Oversee day-to-day operations
- Nurture a strong school culture
- Build and support the leadership team
- Serve as the primary spokesperson for the school



Shared Responsibility

A strong school depends on constructive relationships, clear roles, and a shared commitment to the mission. Each part of the leadership ecosystem contributes distinct expertise, and all three work together to strengthen the school's present and future.

Leadership Team

- Translate the mission into programs and practice
- Provide operational and instructional expertise
- Lead key areas of the school
- Collaborate across disciplines
- Develop future leadership capacity

What meaningful board support looks like for the Head of School

- Clarity about the head’s authority and expectations
- Regular, candid communication through appropriate channels
- Thoughtful goals, evaluation, and formative feedback
- Support in public; honest challenge in private
- Respect for leadership capacity and sustainability

The Board and the Head: Distinct Roles

THE BOARD · GOVERNS

- Articulates mission and guiding values
- Sets long-term direction with the head
- Hires, supports, evaluates, and empowers the head
- Oversees long-term financial sustainability
- Recruits and develops trustees

THE HEAD · LEADS & MANAGES

- Leads the school and collaborates with board/chair
- Brings mission to life through programs and policies
- Implements strategy
- Hires, supervises, and evaluates staff
- Develops and oversees operating budget
- Manages day-to-day operations

Scenario 2: When Helping Hurts

Enrollment is declining. A trustee with marketing expertise offers to help. The head appreciates the offer but says the leadership team is developing a plan.

The trustee then contacts the admissions director directly to review materials. The director welcomes the expertise but feels unable to decline a board member's offer. The head is frustrated; the trustee is surprised: "I'm just trying to help."

DISCUSS

1. Why is each person's perspective understandable?

2. Where is the governance boundary?

3. How can expertise strengthen—not bypass—leadership?

GOVERN - DUAL ROLES

When you are both a parent and a trustee

IN THE BOARDROOM

- Think on behalf of the whole school
- Separate the school's interests from your child's immediate needs
- Recognize potential conflicts and recuse when appropriate

IN THE COMMUNITY

- Maintain confidentiality
- Refer operational concerns through proper channels
- Recognize that your words carry extra weight
- Never imply authority you do not have

Your trustee role changes how others hear you.

Synthesis

Putting it all together



Protecting the future requires better questions

Instead of asking only…

“What should we cut?”

Try asking…

“What must we preserve, and what must change?”

A School at a Crossroads



Scenario 3: A school at a crossroads

Brookfield School is known for small classes, close student–teacher relationships, and educating the whole child. Enrollment has declined, aid demand is rising, and compensation costs continue to grow.

The head presents a five-year forecast showing growing deficits without meaningful change. Trustees immediately suggest tuition increases, fundraising, staffing cuts, and new programs.

The chair asks: “Before debating solutions, what do we need to understand?”

DISCUSS

1. Identify your THREE most important stewardship questions.

2. What must endure—and what might change?

3. How can the board guide without managing?

Closing Reflection

What is one thing you will do differently as a trustee because of today's conversation?

Trusteeship is a responsibility. Stewardship is how that responsibility is exercised over time.





Time for *Burning* Governance Questions!

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