



**ASSOCIATION *of* COLORADO
INDEPENDENT SCHOOLS**

New Trustee Orientation

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Today's Agenda

- Welcome and Introductions
- Qualities and Characteristics of High Performing Boards and Trustees
- Supporting a Strong Head-Board Partnership
- Trends and Challenges for Independent Schools and Boards
- Let's Practice – Case Studies!
- Time for Q&A



How To Be A Good Trustee

Roles + Responsibilities:

Board

Head of School

Faculty and Administrative Staff

School Community

Donors



How the Board/Head Relationship Works in Decision Making

BOARD-HEAD PARTNERSHIP: TIME AND ATTENTION

Policies
Strategies
Mission
Survival
Leadership

BOARD'S DECISIONS

HEAD'S ADVICE

Partnership
Authorizations
Finance policies
Enrollment
Employment Terms

**SHARED DECISIONS:
BOARD AND HEAD**

Operational
Admissions
Staffing
Program
Systems

**BOARD'S
ADVICE**

HEAD'S DECISIONS

Qualities of High Performing Boards

- 1.** A Shared Understanding of Roles and Responsibilities
- 2.** A Strong Strategic Orientation
- 3.** A Planned System for Building the Board
- 4.** A Culture of Self-Assessment and Accountability
- 5.** A Structure That Supports Efficiency and Innovation

What's Your Job?

1. Hire, support, and evaluate the HOS (The HOS is your partner)
2. Support mission, vision, and values
3. Understand good governance, specifically the separation between governance and operations
4. Educate yourself
5. Ensure a sustainable future through fiduciary oversight, strategic planning ,and generative thinking
6. Ensure adequate financial resources and protect school assets
7. Build and maintaining an effective board
8. Hold the school "in trust"

Best Practices For Individual Trustees

1. Actively support the school's mission, vision, goals, and policies
2. Do not become involved directly in management, personnel, or curricular issues
3. Separate the interest of the school from the specific needs of a child or family
4. Support board decisions, HOS, and demonstrate that support publicly
5. Authority is vested in the board as a whole, not in an individual trustee
6. Each trustee has fiduciary responsibility for sound financial management

Triggers

Leadership changes

Financial pressures

Personal issues

Lack of good governance understanding
Disruptions within the school community

Reputation concerns

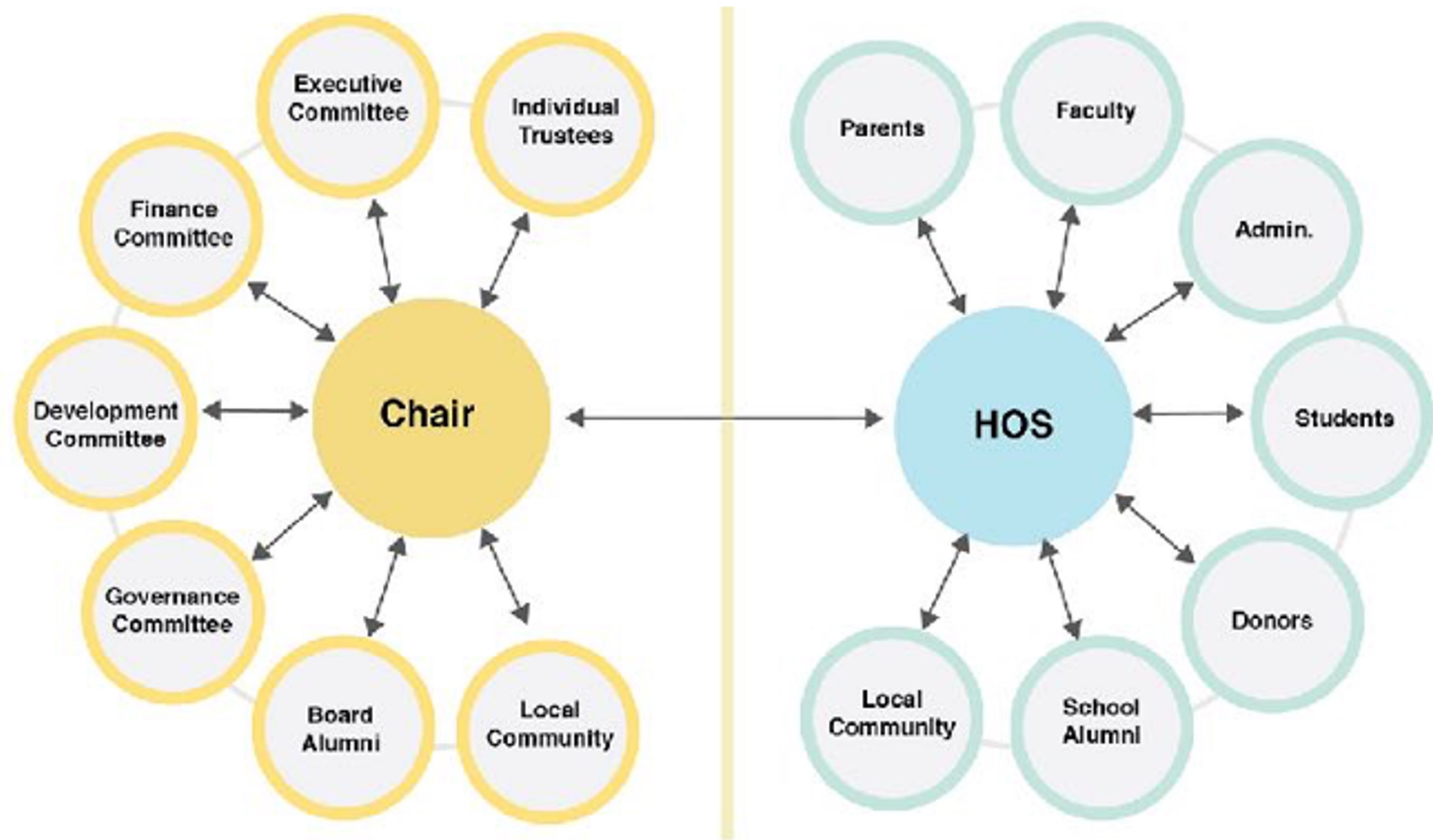
Low admissions

Community polarization

Uncertainty

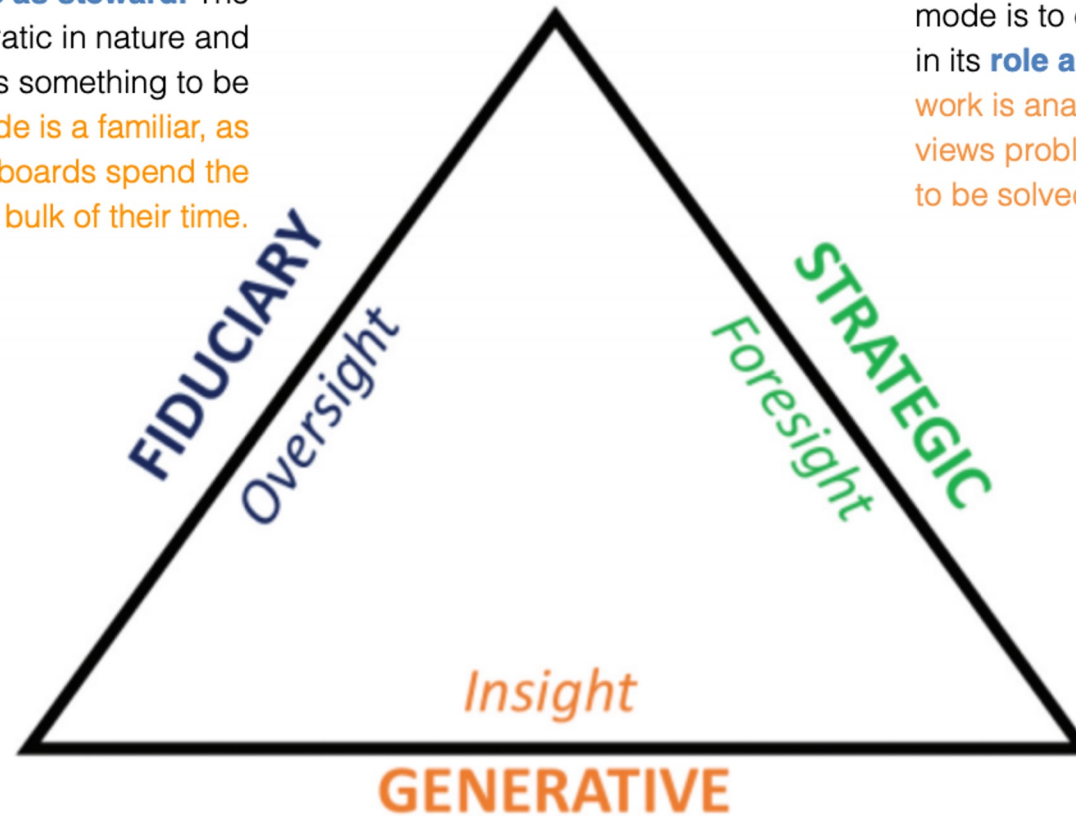


Working Together: Committees



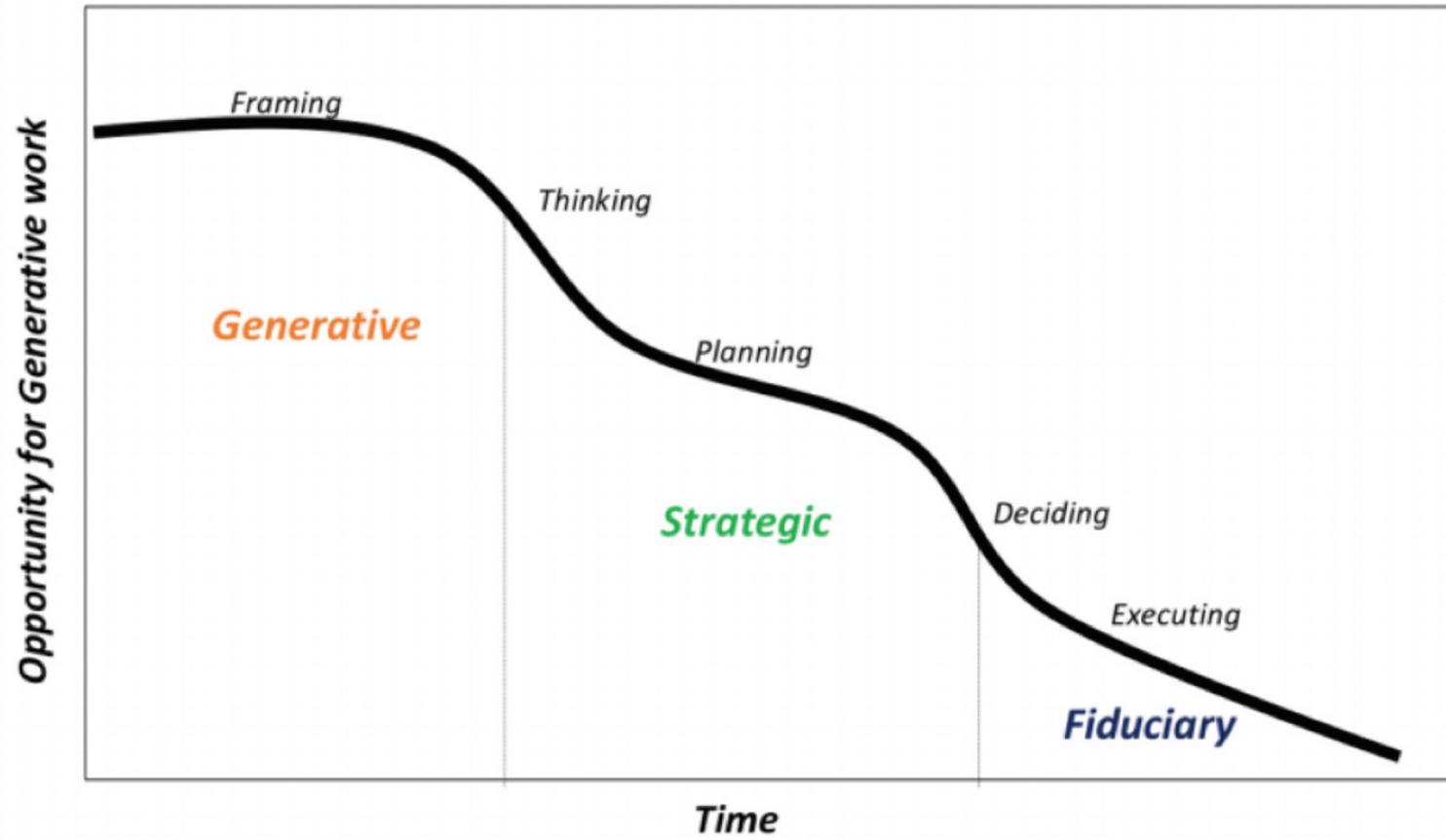
Generative thinking reframes a board's work by fostering each trustee's ability to serve as a **thought-leader** who is able to ask catalytic questions, frame problems, and grapple with complexity.

In the **fiduciary mode** the board's primary function is to exercise oversight, in its **role as steward**. The work is bureaucratic in nature and views problems as something to be identified. *This mode is a familiar, as it is where many boards spend the bulk of their time.*



In the **strategic mode** the board's primary function in this mode is to exercise foresight, in its **role as strategist**. *This work is analytical in nature, and views problems as something to be solved.*

In the **generative mode** the board's central purpose in this mode is to develop insight in its **role as a sense-maker**. Generative work is non-linear and non-rational in nature, embraces divergent viewpoints, questions assumptions, and views problems as something to be framed. *When working in this mode, a board functions as a sort of think tank, with conversations that are looser and more free flowing.*



Culture

“Culture eats strategy for breakfast”

Peter Drucker



School board norms:

are collectively developed and mutually agreed upon expectations that provide guidance and directions to board members at board meetings.

Norms for Boards

- **Preparedness:**
Come to the meeting ready to engage with the agenda
- **The 80/20 Rule:**
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
- **Culture/Climate:**
Grapple with tough issues/challenges while assuming good intent and seeking to understand
- **Deliberations:**
Base decisions on as much information-gathering as possible
- **Development/Philanthropy/Financial Support:**
Giving and friend-raising
- **Role:**
Know your “lane”
- **Conflict:**
Parent v. Trustee

What Is Your Impact?





Supporting a Strong Head of School and Board Partnership

Hot of the NAIS Trendbook Press...

- More women and people of color are serving as heads of school
 - 2013 - 2014: 6.4% heads of color/ 35.8% female heads
 - 2023 - 2024: 13.5% head of color/ 45.2% female heads
- **Unexpected head of school turnover continues to rise**
 - **20%** (2018 - 2019) to **24%** in (2023-2024)



Insights from the 2021 NAIS State of Independent School Leadership Survey

61% of NAIS administrators intend to leave their current position by 2026. 43% said their career plans were affected by the pandemic, especially admins of color (49%) and LGBTQ+ admins (64%).

55% of heads intend to depart by 2026.

Of those, 11% plan to leave the sector, 28% plan to change schools, and 37% plan to retire. (Others are undecided.)

40% said their career plans were affected by the pandemic, especially female heads (49%), heads of color (48%), and LGBTQ+ heads (57%).

Headship Yesterday and Today

2009 Leadership Challenges

- Providing vision
- Managing their school's climate and values
- Working with their boards

2021 Leadership Challenges

- Increased pressure and stress
- Isolation
- Helping their school communities address the pandemic, racial injustice, and economic insecurity and overall uncertainty

Source: NAIS Leadership Study

The Question of Support



The Governance Dichotomy: Govern and Support

The Board as a Whole - GOVERNS

- Determine mission and purpose
- Hire, evaluate, and support the Head of School
- Strategic planning
- Ensure adequate financial resources
- Protect assets and provide proper financial oversight
- Build a competent board, orientation, self evaluation
- Ensure legal and ethical integrity

Individual Trustees - SUPPORT

- Fully participate in board and committee meetings
- Financial support
- Fiduciary responsibility
- Separate interests of the school from the needs of your child
- Accept and support board decisions
- Support the school and the HOS in the community
- Confidentiality
- Law of no surprises

The Conversation: How the Board Can Best Support the Head of School - NAIS

*It's hard to express **vulnerability** in a professional context. You have a helpful board, and the opportunities to continue to work together in a supportive way and for the best interest of our school and our community. There's no one right answer to the question, and there is **no specific road map**.*

What Does HOS Support Look Like?

- *What can I do? vs This is what I can do.*
- Support looks and feels different for different heads of school.
- Communication is key!



DEMOGRAPHIC

ECONOMIC

POLITICAL



ECOLOGICAL

SOCIO-CULTURAL

TECHNOLOGICAL

Trends and Challenges Facing Independent Schools and Boards

Updated: August 19, 2024 Analysis, Macro-environment, PESTLE



Why Board Learning to Support Good Governance

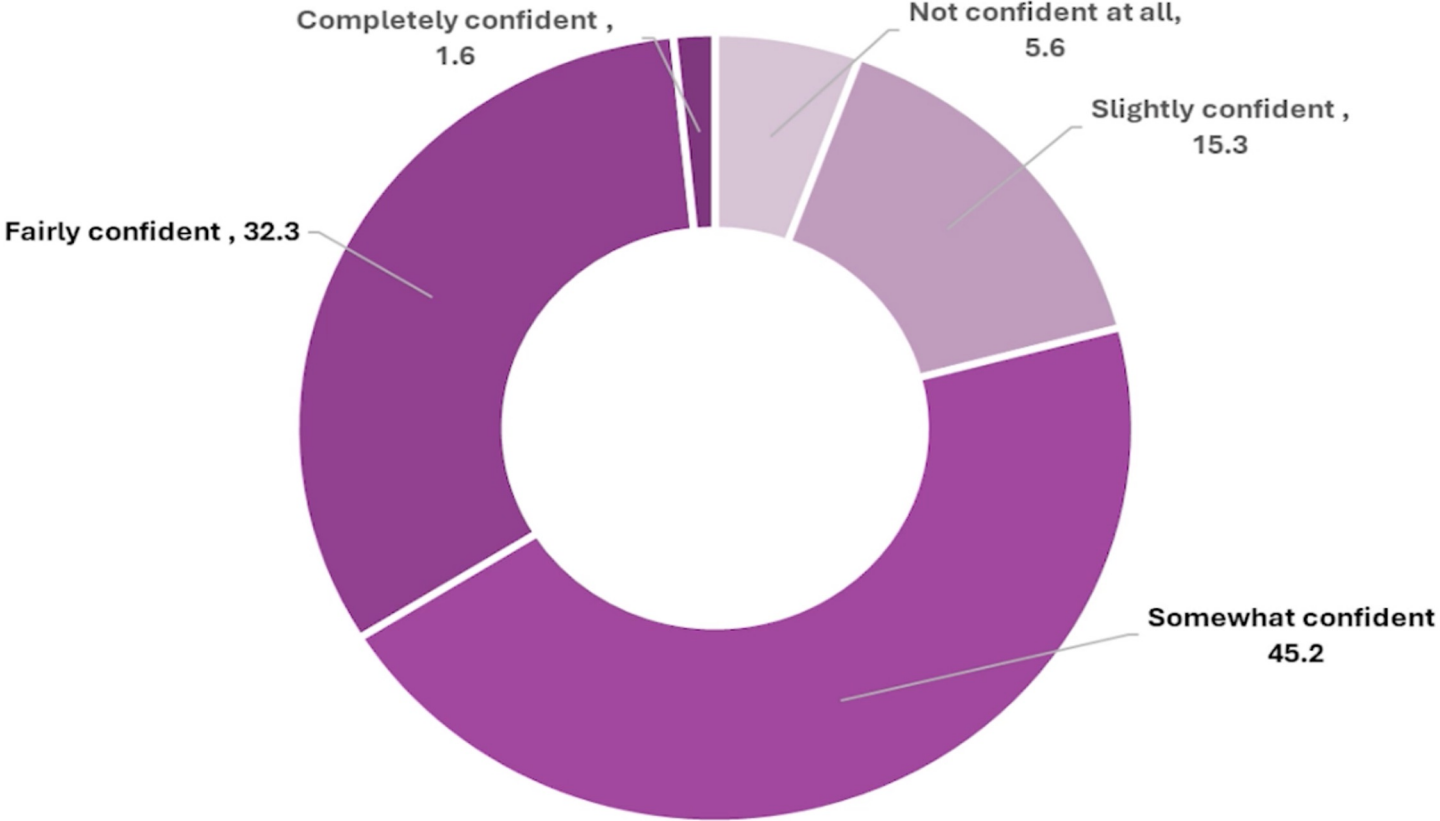
- Like any ship, NO school can avoid occasional stormy waters
- For a number of reasons, stormy waters can be more frequent today in schools

What's Different Today?

- Current Polarized Political Environment
- Increased Costs= Increased Expectations
- Impact of Social Media on Behaviors and Communication Channels
- Changing Mindset of Parents
- Occasional Philosophical Disconnect Between Teachers and Parents



How confident do you feel about your ability to successfully lead through polarization at your school during this election season? (Note that leadership can mean teaching a class or chairing a board of trustees.)



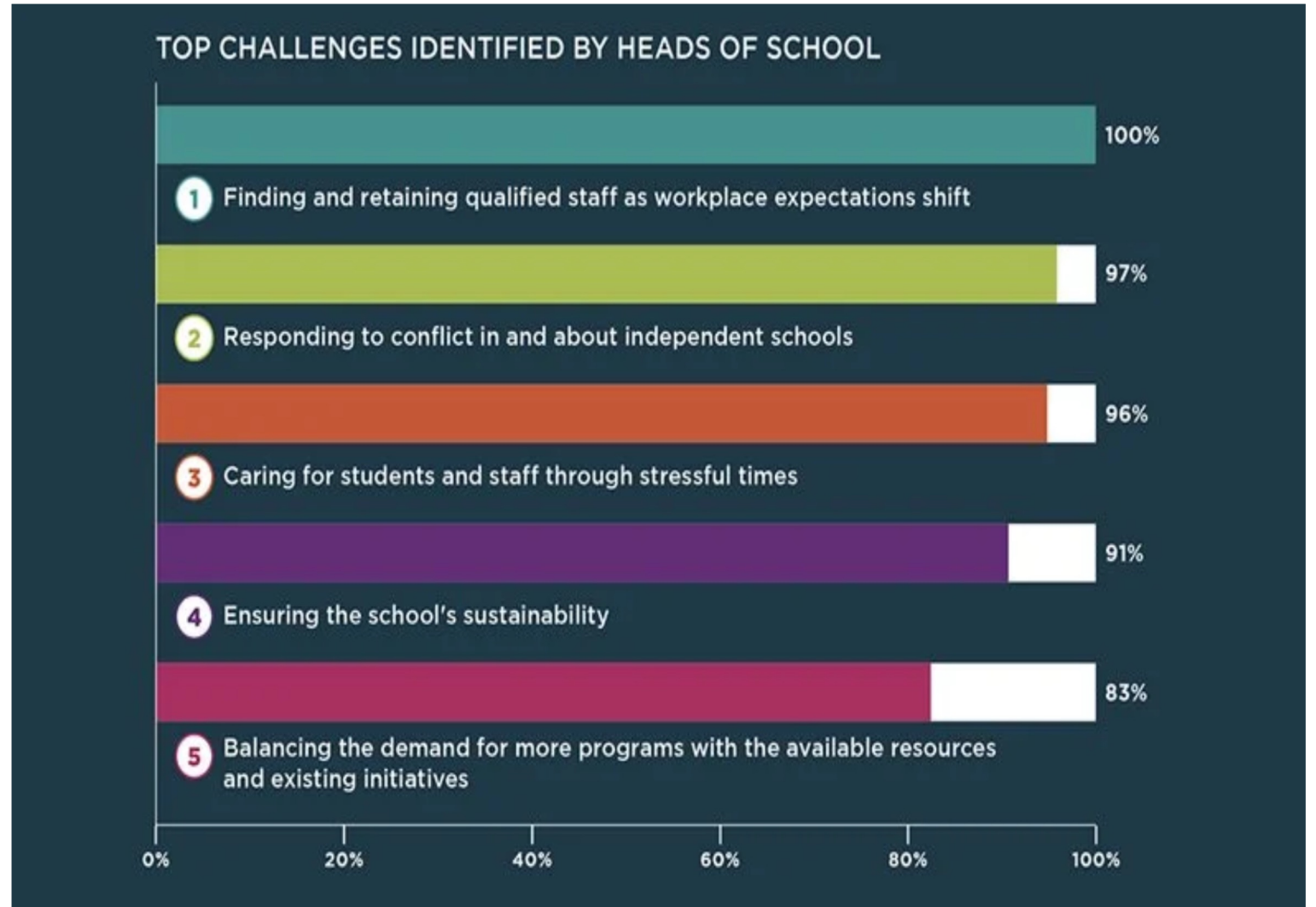
Good Governance Makes Navigating Complex Challenges Easier

*Effective governance is a dynamic, collective activity in which **well-informed trustees** engage **actively**, and **ask meaningful questions**, on consequential issues with **important outcomes** for which they hold themselves (and not just the Head) **accountable**.*

Source - Cathy A. Trower

The National Perspective View

From the NAIS *Hot Issues
Survey Report 2023*:
Challenges and
Opportunities for
Independent Schools



Teacher Workforce Challenges and Professional Development

Amid growing teacher shortages and burnout, schools must focus on **professional development, innovative recruitment strategies, and retention efforts**. Addressing workforce challenges will be critical for the sustainability of education systems.

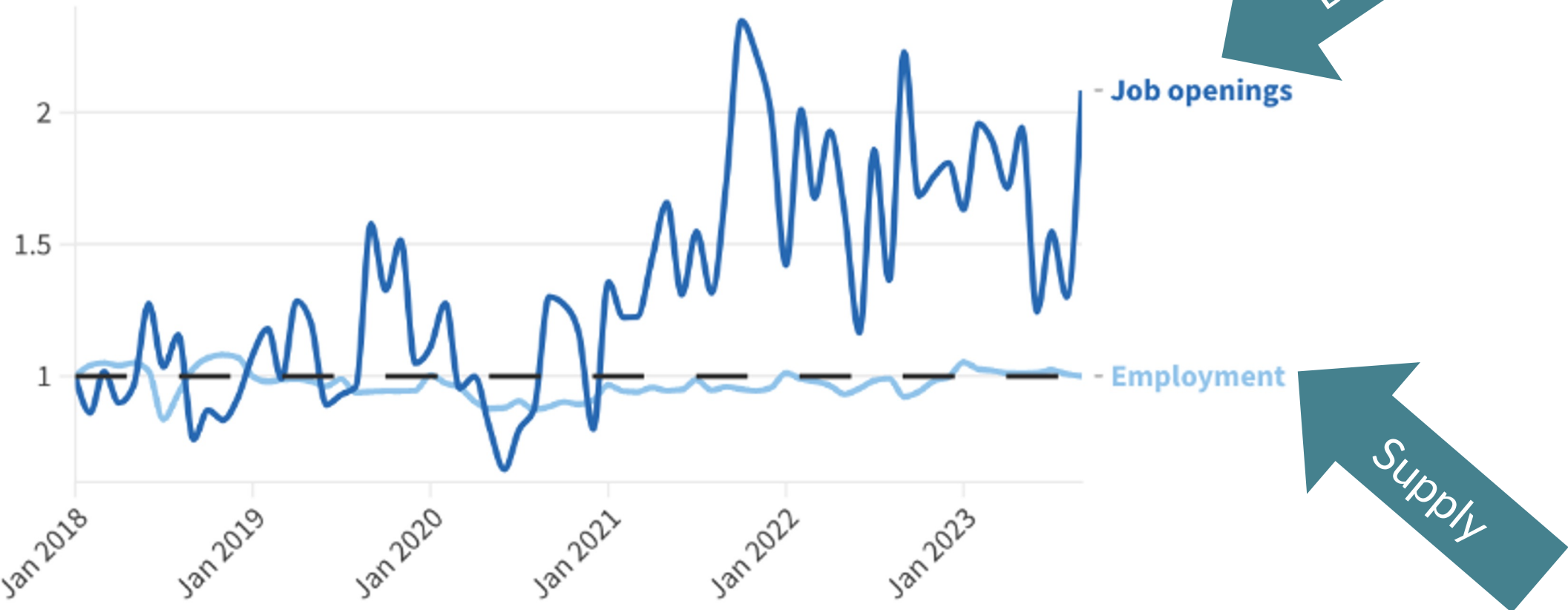
"Teacher shortages and burnout must be tackled with systemic changes to workload, support, and professional development." –

Learning Policy Institute

Source: Learning Policy Institute, "The Teacher Shortage Crisis: Why It Matters and How to Address It."

Demand for teachers outpaces supply

Index (Jan 2018 = 1)

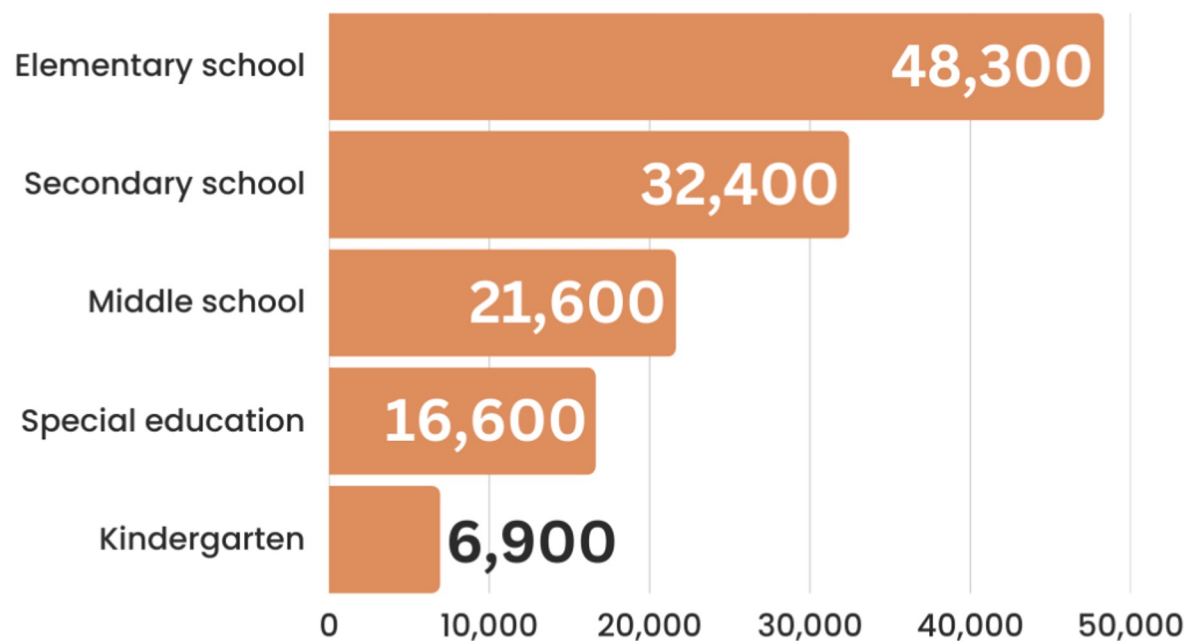


Source: Job openings index for Education Services sector from Bureau of Labor Statistics Job Openings and Labor Turnover Survey. Employment index based on ADP data for public and private kindergarten through 12th-grade teachers. Not seasonally adjusted.

Source



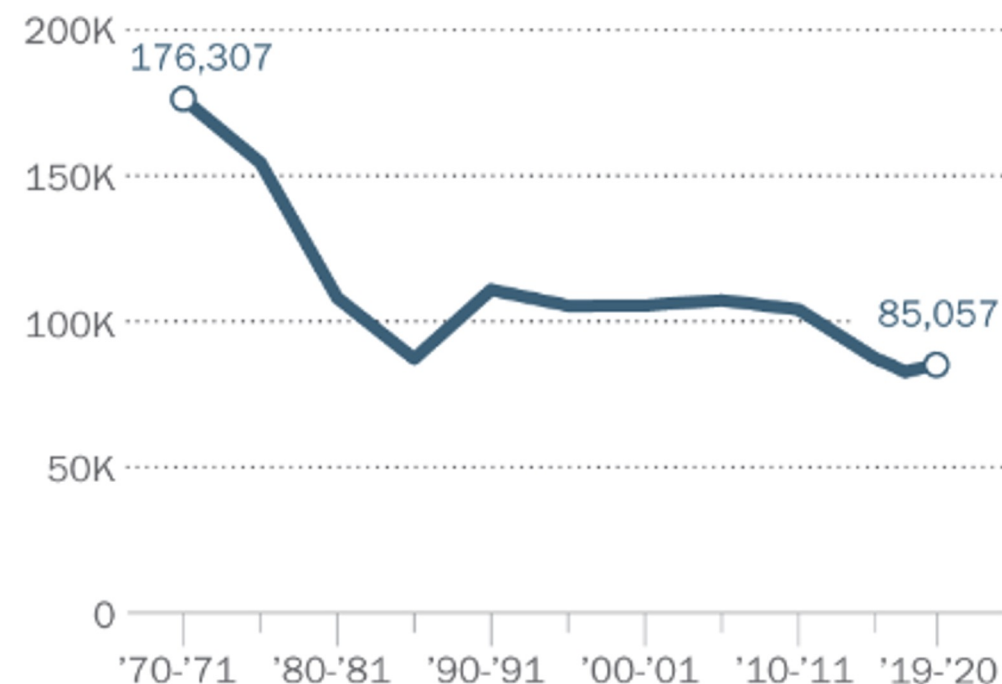
LABOR FORCE EXITS, PROJECTED 2020-26 ANNUAL AVERAGE



Source

In the U.S., the number of bachelor's degrees in education has declined over the last few decades

Number of bachelor's degrees in education conferred by postsecondary institutions, by school year

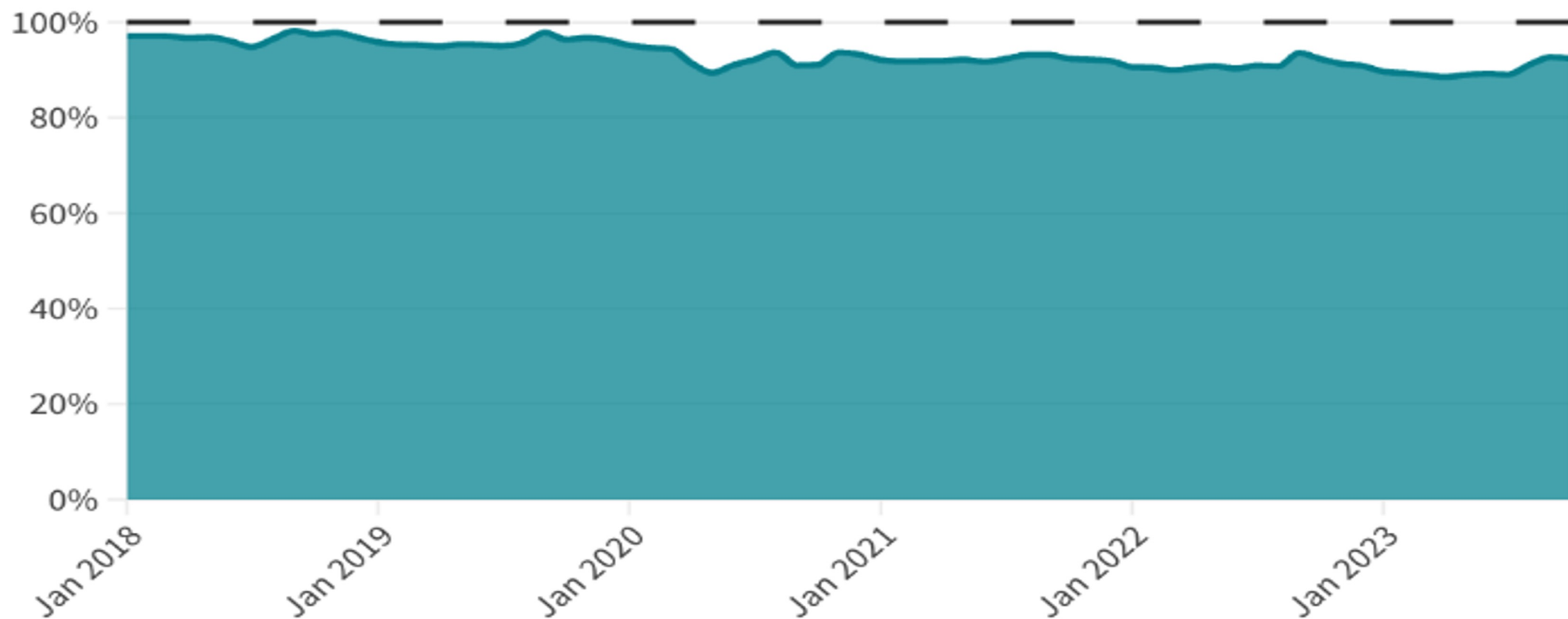


Source: U.S. Department of Education, National Center for Education Statistics.

PEW RESEARCH CENTER

Teacher salaries become less competitive

Competitive Salary Index (teachers vs. all employees)



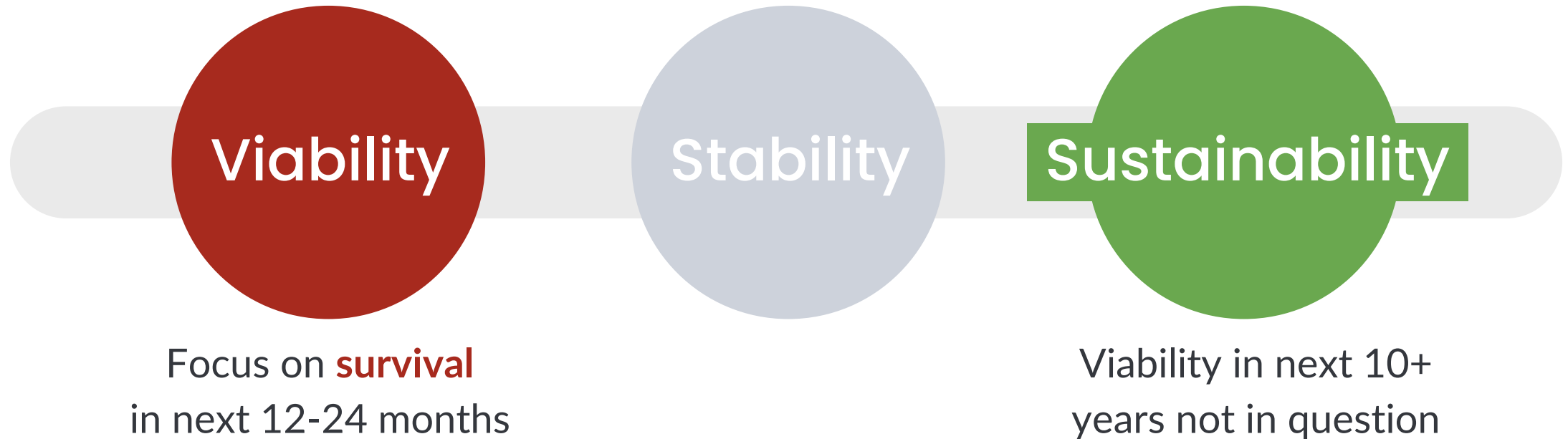
Source: ADP data.

Competitive Salary Index is average teacher salary as a percentage of average salary for all employees.





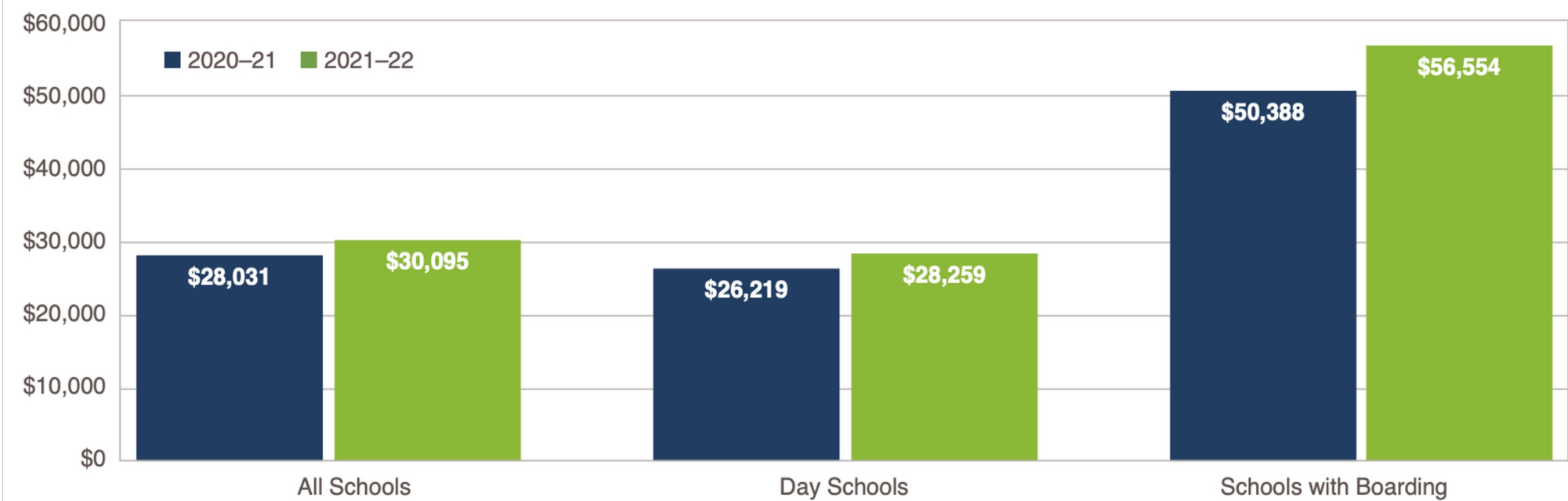
Spectrum of Financial & Organizational Health



NBOA's Financial State of the Industry Report 2023

Total Operating Expenses per student
(includes employee salaries and benefits
= largest operating expenses)

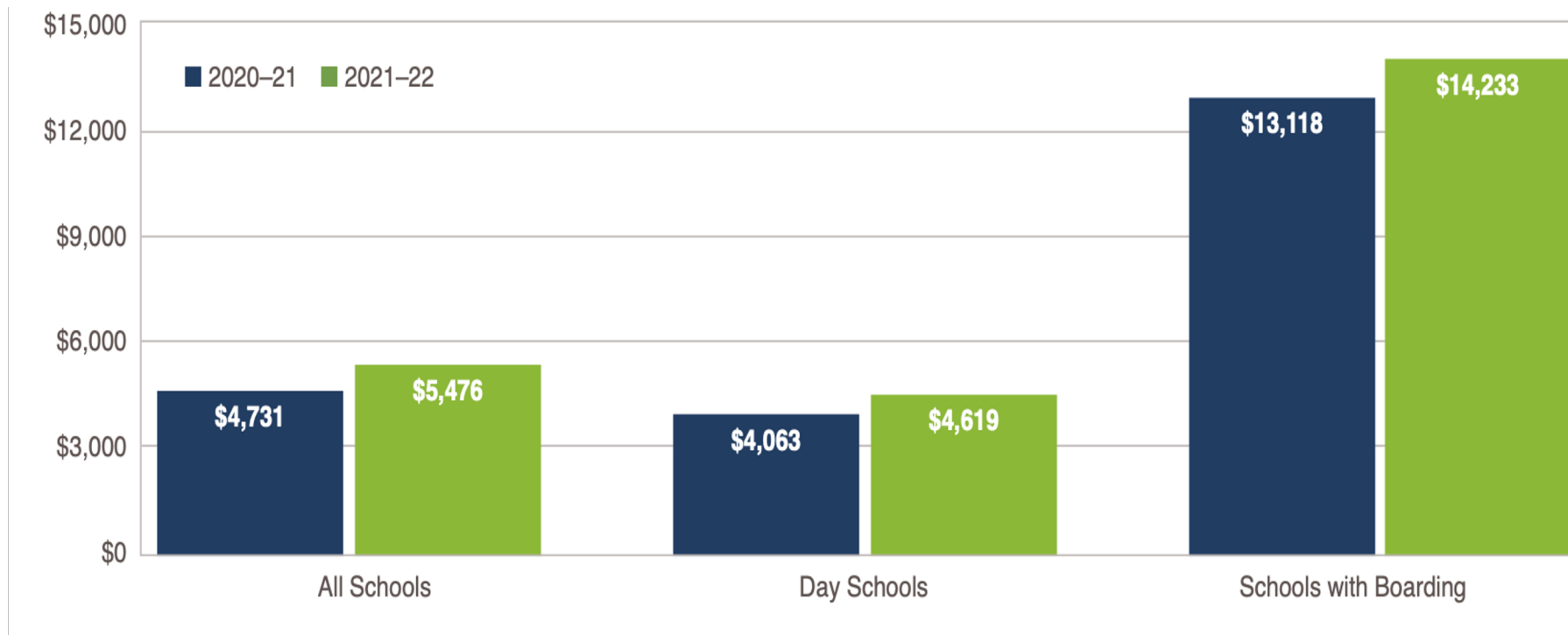
Median total operating expenses per student for all schools increased from **\$28,031** in 2020-21 to **\$30,095** in 2021-22 – a **7.4%** increase.



NBOA's Financial State of the Industry Report 2023

The **“GAP” per student** – the difference between total operating expense per student and the net tuition and fees per student.

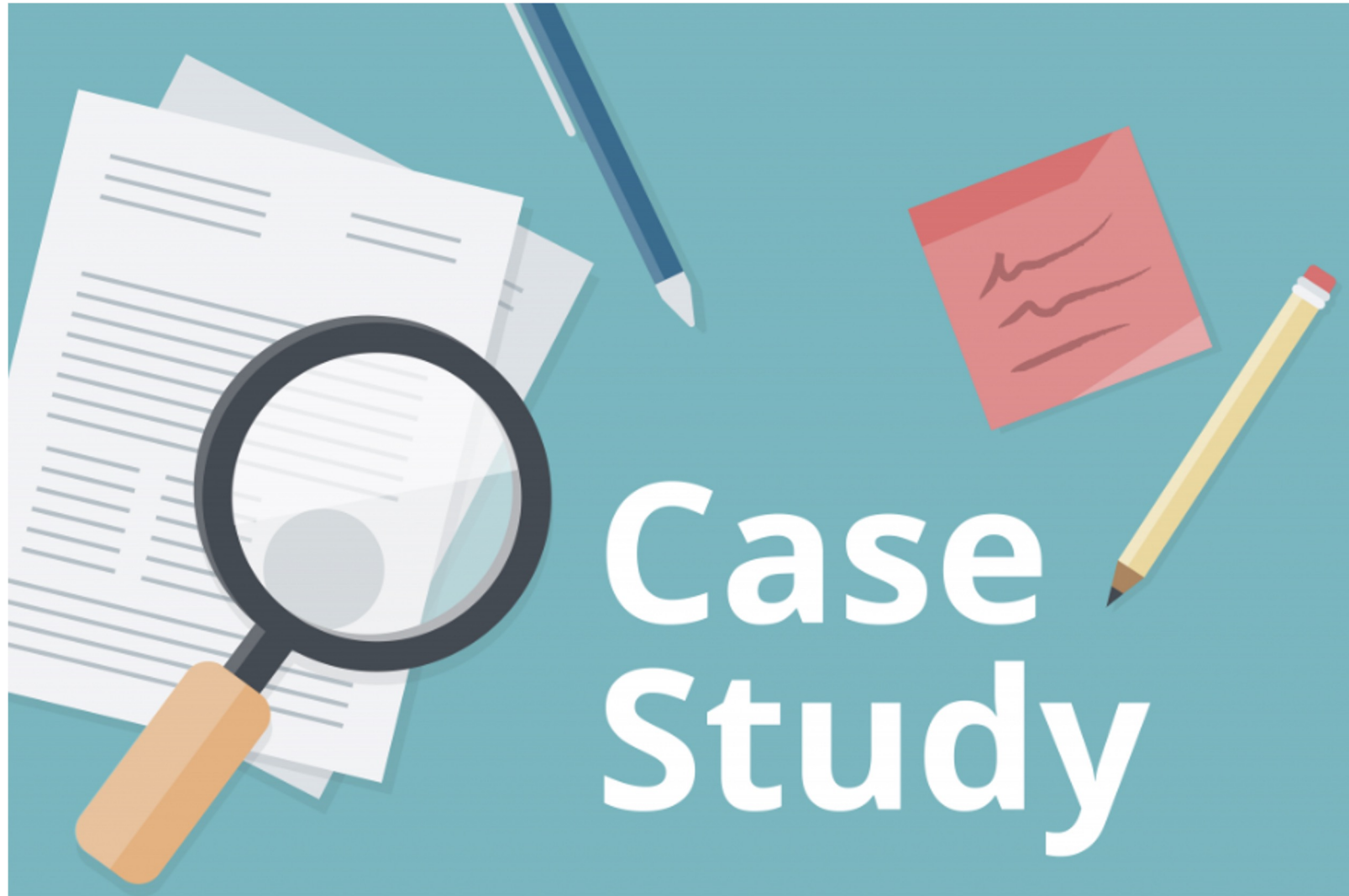
Median gap per student for all schools increased from **\$4,731** in 2020-21 to **\$5,476** in 2021-22, a **15.7%** increase



Strategic Questions for Boards to Consider

- 1) What are the financial implications for becoming the “employer of choice” in your market?
- 2) How do you support a culture of philanthropy on your board? In your school community?
- 3) How might you use tools like Market View to better understand shifting demographics in your area and how it impacts enrollment strategy?
- 4) How does your board leverage data to determine progress towards strategic goals? The impact of your school’s mission?





**Let's
Practice!**



**Time for
Q&A**



**Let's Stay
in Touch!**

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