

# ANNUAL LEADERSHIP CONFERENCE



36TH ANNUAL LEADERSHIP CONFERENCE • OCTOBER 10-11, 2024

## LOCATION/HOTEL RESERVATIONS

Grand Hyatt Vail  
1300 Westhaven Drive, Vail, CO 81657  
Vail, CO 81657  
(970) 476-1234 or 800-831-3306

**Make reservations by September 11, 2024 to assure these rates:**  
\$199.00 per night, single or double occupancy.  
(Same price for Deluxe and Standard rooms. Suites available for additional charge.)

**CANCELLATION POLICY: 7 DAYS IN ADVANCE OF ARRIVAL.**

Please make your Grand Hyatt Vail Hotel reservation online at:  
<https://www.hyatt.com/en-US/group-booking/EGEGH/G-ACIS>  
Identify yourself as an attendee of the Association of Colorado Independent Schools conference.

## QUESTIONS?

Visit our website at [www.acischools.org](http://www.acischools.org)  
or contact Alan Smiley, Executive Director  
**(303) 444-2201**

## CONFERENCE REGISTRATION

### EARLY REGISTRATION (received BY September 11)

- Member schools \$475 per person
- Non-member schools \$500 per person
- ACIS school staff \$300 per person for attending Friday only  
(Not heads or trustees)
- Courtesy Extension (Members Only)

The early registration fee will prevail after 9/11 for member schools that register eight or more participants.

### REGISTRATION (received after September 11)

- Member schools \$550 per person
- Non-member schools \$575 per person
- ACIS school staff \$375 per person for attending Friday only  
(Not heads or trustees)

## REGISTRATION INFORMATION

- **REGISTER** now at [www.acischools.org](http://www.acischools.org)
- **PAYMENT BY MAILING YOUR CHECK** to:  
ACIS, 4000 S. Wadsworth Blvd., Ste. 230,  
Littleton, CO 80123
- We also accept **PAYMENT BY CREDIT CARD:**  
<https://link.clover.com/urlshortener/JLWxqz>
- \$50 discount for the spouses/partners of conference registrants
- Dinner and Keynote only—\$150.00

**NO REFUNDS FOR CONFERENCE  
CANCELLATIONS AFTER SEPTEMBER 11, 2024!**

# ANNUAL LEADERSHIP CONFERENCE



## ACIS LEADERSHIP CONFERENCE SCHEDULE 2024

### THURSDAY, OCTOBER 10, 2024

TIME	TRACK/SPEAKER	LOCATION
3:00 – 5:00 pm	New Trustee Orientation: Monique Davis and Anne-Marie Balzano	Gore D
3:00 – 5:00 pm	Heads' Roundtable: Brad Rathgeber <i>For Heads of School Only</i>	Zermatt Ballroom
3:30 – 5:00 pm	Circle of Chairs Discussion <i>For Current and/or Rising Board Chairs Only</i>	Gore A & Gore B
5:30 – 6:00 pm	Registration	
5:45 – 6:30 pm	Reception	Gore Pavilion
6:30 – 7:45 pm	Dinner & Dessert	Cascade DEF
7:15 – 7:45 pm	<b>EVENING KEYNOTE: DR. KATY ANTHES</b> Leading Education in a Time of Conflict and Polarization – Being Part of the Solution.	Cascade DEF

### FRIDAY, OCTOBER 11, 2024

TIME	TRACK/SPEAKER	LOCATION
7:15-8:15 am	Registration and Book Sale	Cascade Foyer
7:30-8:15 am	Breakfast Buffet	Cascade DEF & Foyer
8:30-10:00 am	<b>KEYNOTE: DR. MANYA WHITAKER</b> Preparing Students for the College of Tomorrow	Cascade DEF
10:00 – 10:30 am	Break, Visit Sponsors	
10:30-11:45 am	<b>Concurrent Sessions (Morning)</b>	
	① <b>Strategic Positioning for Future Success: Building Futures Literacy and Scenario Planning in Schools</b> Ann Marsh Rutledge	Cascade A
	② <b>A Research-Based Look into Governance Challenges</b> Bonnie Ricci	Gore A
	③ <b>Hiring Trends in Independent Schools</b> Brad Rathgeber	Gore B
	④ <b>What 100 Heads of School Reveal About the Independent School Business Model</b> Peter Baron	Cascade B
	⑤ <b>Embracing a DEI Lens to Achieve Holistic Growth and Avoid Pitfalls as a Community</b> Sumant Bhat	Gore C
	⑥ <b>From the Classroom to Courtroom: Hot Topics for Independent School Leaders</b> Megan Mann	Cascade C
11:45 am-12:45 pm	Lunch Buffet	
12:45-1:30 pm	School-Based, School Staff Affinity or Head-led Breakout Discussion Groups, Visit Sponsors	
1:45-3:00 pm	<b>Concurrent Sessions (Afternoon)</b>	
	① <b>Strategic Positioning for Future Success: Building Futures Literacy and Scenario Planning in Schools</b> Ann Marsh Rutledge	Cascade A
	② <b>A Research-Based Look into Governance Challenges</b> Bonnie Ricci	Gore A
	③ <b>AI Trends and Considerations in Education</b> Brad Rathgeber	Gore B
	④ <b>What 100 Heads of School Reveal About the Independent School Business Model</b> Peter Baron	Cascade B
	⑤ <b>Embracing a DEI Lens to Achieve Holistic Growth and Avoid Pitfalls as a Community</b> Sumant Bhat	Gore C
	⑥ <b>Governing through Conflict: Key Lessons from the Past and Present</b> Megan Mann	Cascade C

# ANNUAL LEADERSHIP CONFERENCE



## PRESENTATION DESCRIPTIONS

### THURSDAY, OCTOBER 10, 2024

Heads' Roundtable | 3:00-5:00 pm

#### Collegial Conversation and Collaboration *Brad Rathgeber*

This will be an opportunity for current ACIS Heads of School to gather for collegial conversation and collaboration. Topics will be communicated in advance of the gathering and based on timely interests and areas of concern. *Only current ACIS Heads of School may participate.*

New Trustee Orientation | 3:00-5:00 pm

#### *Monique Davis and Anne-Marie Balzano*

This workshop will explore strategies for effective school trusteeship. Participants will review standards of good practice for boards, clarify roles and responsibilities, and share ideas for working in partnership with administrators to provide strategic leadership for the school. Case study discussions will foster creative engagement, explore application of good governance principles, and address common board challenges.

### FRIDAY, OCTOBER 11, 2024

Keynote | 8:30-10:00 am

#### Preparing Students for the College of Tomorrow *Dr. Manya Whitaker*

The keynote presentation aims to provide a comprehensive roadmap for educators to equip students with the cognitive, emotional, and academic tools they need for successful transitions to higher education and beyond. We will examine current trends in higher education, including the growing importance of interdisciplinary studies and the increasing emphasis on skills over traditional degrees. We will discuss strategies for K-12 independent schools to foster a love of learning while promoting executive functioning skills such as attention and self-regulation that are vital to students' educational success in an evolving higher education landscape.

Morning Presentations | 10:30-11:45 am

#### ① Strategic Positioning for Future Success: Building Futures Literacy and Scenario Planning in Schools *Ann Marsh Rutledge*

In today's complex and rapidly evolving world, the ability to anticipate, envision, and shape the future is essential for success in the face of challenges. This session will present a new view of strategic planning through futures literacy grounded in scenario planning. This interactive session will equip you with research-backed insights, systems, and tools to enhance strategic planning by integrating future trends and scenarios. Cultivate creativity, agility, and confidence by positioning your school strategically to thrive amidst uncertainty.

Circle of Chairs | 3:30-5:00 pm

An experienced board chair from ACIS will lead this roundtable conversation about the critical partnership between school heads and board chairs. Based roughly on school size, discussions will identify common and current challenges as well as proven strategies for effective board leadership. *Only current and rising board chairs may participate.*

Keynote | 7:15 pm

#### Leading Education in a Time of Conflict and Polarization – Being Part of the Solution *Dr. Katy Anthes*

K-12 education, along with other important public policy issues, is in a challenging place in our history given the polarized and often high conflict environment we find ourselves in. Sometimes it seems that intense ideologies, "us vs them" mentalities, and anger are the main driver of our education-related discussions and lead us down paths that don't focus on productive middle ground nor help us support students. Yet, we can make progress toward changing this environment by building our "good conflict" muscles — muscles that allow us to be curious, disagree, problem solve, bring forth new ideas and develop a deeper respect and understanding from where others are coming. By modeling this, we will be cultivating people, organizations, and partners who are focused on getting our educational approaches and collective decision-making skills back on track.

#### ② A Research-Based Look into Governance Challenges *Bonnie Ricci*

Any head of school or board member will tell you that a highly functioning and effective Board of Trustees is fundamental to school strength and sustainability. Challenges in the boardroom, however, can be frequent, far-reaching, and deeply rooted. The ICAISA organization has conducted research on what particular governance challenges schools are facing. Insights from this research will illustrate how the accreditation process can provide a point of leverage for school heads and their boards. This interactive session will offer analysis and recommendations related to common governance challenges facing independent schools.

#### ③ Hiring Trends in Independent Schools *Brad Rathgeber*

Hiring and retaining great educators is essential work in independent schools...and harder to do than ever before. In this session, we'll look at the data to uncover what's changed in a post-COVID world, and then explore strategies for mitigating the challenges. Leave with a greater understanding of the complexities of the current hiring landscape and with practices to employ on campus.

## PRESENTATION DESCRIPTIONS

### FRIDAY, OCTOBER 11, 2024

Morning Presentations *(continued)* | 10:30-11:45 am

#### ④ What 100 Heads of School Reveal About the Independent School Business Model

*Peter Baron*

After more than one hundred conversations with heads about the independent school business model, the results are in. Uncover the critical challenges facing today's independent schools and discover how schools are effectively redefining the model. This session will delve into case studies of schools, analyzing their paths to success and offering actionable insights. Essential for trustees and school leaders, this workshop offers a critical examination of current hurdles, identifies opportunities to reimagine the business model, and provides a hopeful outlook for the future of independent schools.

#### ⑤ Embracing a DEI Lens to Achieve Holistic Growth and Avoid Pitfalls as a Community

*Sumant Bhat*

Creating communities that celebrate diversity and foster a strong sense of belonging is core to all of our school missions. Yet, every school is at a unique spot on its individual journey, and there are always both wonderful successes and emotionally draining challenges along the way. It can often feel like we aren't making consistent forward progress towards our lofty goals and are instead just reacting to issues as they arise. Learning how to shift your team's mindset to one where DEI is a lens through which you view all aspects of your school rather than an endpoint can help in charting an intentional, sustainable course of growth. Develop a better understanding of how your board, head of school and leadership team can work together to avoid common pitfalls that obstruct institutional improvement. Leave with strategies to take meaningful steps to help your community build a collective DEI lens that will create holistic progress and continually strengthen your community.

#### ⑥ From the Classroom to Courtroom: Hot Topics for Independent School Leaders

*Megan Mann*

Review the sticky legal, risk, and crisis related issues trending in the 2024-2025 school year. Through case studies and discussion, the group will explore trends and share thoughts about how these issues are impacting the boardroom to the classroom, as well as strategies for preparing for and managing them. We will explore the impact of the election and geopolitical events on school policies and classroom procedures; the challenge presented when families involve the school in legal disputes; and student misconduct.

Afternoon Presentations | 1:45-3:00 pm

#### ① Strategic Positioning for Future Success: Building Futures Literacy and Scenario Planning in Schools

*Ann Marsh Rutledge*

*See description under morning session.*

#### ② A Research-Based Look into Governance Challenges

*Bonnie Ricci*

*See description under morning session.*

#### ③ AI Trends and Considerations in Education

*Brad Rathgeber*

Independent schools are working now to figure out the place of Generative AI in their schools. In this session, we'll consider a whole-school, human-centered approach for independent school leadership and boards. Discover best practices for determining ethical use, fostering critical thinking skills, and ensuring AI empowers, not replaces, human expertise.

#### ④ What 100 Heads of School Reveal About the Independent School Business Model

*Peter Baron*

*See description under morning session.*

#### ⑤ Embracing a DEI Lens to Achieve Holistic Growth and Avoid Pitfalls as a Community

*Sumant Bhat*

*See description under morning session.*

#### ⑥ Governing through Conflict: Key Lessons from the Past and Present

*Megan Mann*

Diverse perspectives and opinions help boards make better decisions. Yet the key is to work through conflict to harness the power of these perspectives. In this session designed for heads and boards, we'll look at the role of the board and discuss where conflicts typically emerge in governance settings. We'll examine case studies based on real-life events (anonymized) and discuss how to navigate different situations. We'll discuss strategies to handle disagreements and conflicts constructively, ensuring that the board can operate efficiently and achieve its strategic goals. We'll also look at conflict among the broader school community and discuss how board members can foster a productive and positive school culture.



## SPEAKER BIOS: KEYNOTE SPEAKERS



**KATY ANTHES, PHD**

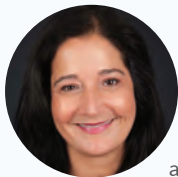
Dr. Katy Anthes is the creator and director of the FORWARD initiative at the Public Education and Business Coalition (PEBC) as well as a founder and partner of The Third Mile Group, a social policy consulting firm. The FORWARD Initiative — from polarization to progress — prepares leaders in public policy to prevent and manage political polarization in their communities and workplaces. Formerly, Anthes was the Commissioner of Education in Colorado from 2016- 2023, and is widely respected for her commitment to listen to diverse perspectives and develop solutions that are founded on productive middle ground. As Commissioner, Anthes worked with the Colorado State Board of Education, the Legislature and the Governor to craft and implement a vision of education for Colorado. She led the Colorado Department of Education, a \$10 billion dollar agency, dedicated to helping districts achieve great things for students. During her time as Commissioner, she served on the Council of Chief State School Officers (CCSSO) Board of Directors and the Education Commission of the States (ECS), Steering Committee. Dr. Anthes was with CDE since 2011, serving as chief of staff, interim associate commissioner for achievement and strategy and executive director of educator effectiveness.



**DR. MANYA WHITAKER**

Dr. Manya Whitaker is the Interim President at Colorado College and Professor of Education. She is a developmental educational psychologist with expertise in identity formation and motivation. Her research examines the development and sustainment of teachers' diversity-related self-constructions within urban schools. Her courses such as Diversity & Equity in Education, Teacher and Teacher Identities, and Educational Psychology inform, and are informed by her research. Her research has generated multiple publications including Schooling Multicultural Teachers: A Guide for Program Assessment and Professional Development, Learning from the Inside-Out: Child Development and School Choice and Counternarratives from Women of Color Academics. Her most recent book, Public School Equity: Educational Leadership for Justice, capitalizes on her consulting with K-12 organizations.

## SPEAKER BIOS



**DR. ANNE-MARIE BALZANO**

Anne-Marie Balzano is Mission and Data's ([www.missionanddata.com](http://www.missionanddata.com)) senior governance strategist. In her role, she designs learning opportunities for heads of school and boards and leads Mission and Data's *Board Chair Support Program*. A former teacher, head of school, associate professor, and most recently, Director of Leadership and Governance at the National Association of Independent Schools (NAIS), she possesses a unique and multi-level perspective of the educational landscape and the complex demands of supporting leadership and governance development across multiple contexts. She is a trusted advisor to schools across the country, facilitating board retreats and educating boards of trustees on effective governance practices and trends, supporting resiliency in heads of school, and building a positive board culture. Independent school trustees and heads of school know Anne-Marie as the chief editor of *The Board Chair Handbook* and the host of NAIS's governance podcast, *The Trustee Table*.



**PETER BARON**

Peter Baron is a dedicated and seasoned advocate for independent schools. His journey began with a personal transformational experience as a boarding student, which profoundly shaped his future and set him on a path of over twenty years of service to schools. Peter is the founder of MoonshotOS, a professional learning community empowering leaders to reimagine the independent school business model. He served as the Chief Member Relations Officer for the Enrollment Management Association, directing EMA's marketing and communications, member recruitment and retention, outreach functions, leadership training programs, research, and other related strategic initiatives. With a career in association management, product development, sales, relationship development, marketing, entrepreneurship, and hosting more than 300 podcasts focused on leadership and independent school growth, Peter's success has been built on listening to schools' and families' needs — rooted in a deep commitment to the transformational experience that independent schools can have for students.

# ANNUAL LEADERSHIP CONFERENCE



## SPEAKER BIOS



### SUMANT BHAT

Sumant Bhat is in his fifth year as head of school at [Stanley British Primary School](#) in Denver, Colorado, a K-8 progressive independent school with a commitment to joyful student-centered classrooms, social-emotional learning, and diversity, equity and inclusion. He's worked in five different independent schools across the country in the classroom, admissions, as division head, and now head of school for over 20 years. His passion for creating inclusive environments in the schools he's worked in has led to host workshops for trustees, teachers, heads of schools and to help co-chair the People of Color Conference in Denver in 2024.



### MONIQUE DAVIS

Monique Davis, a national consultant with nearly three decades of experience, is a trusted partner known for significantly enhancing an organization's impact and sustainability. Her work with various organizations, including non-profits and educational institutions, is centered on believing in the power of collaboration. Monique feels that an engaged, collaborative, and inclusive community is essential to realizing an organization's potential and ensuring its success. She excels in building culture, coaching leadership, strengthening boards, and developing strategic roadmaps to fulfill an organization's mission and vision.

Monique brings her extensive experience in service to her clients. As the founder of a successful branding and marketing firm and the president of a consultancy serving national clients, she brings a wealth of diverse skills and knowledge, including serving on nonprofit boards, being a certified leadership coach, and focusing on trends, organizational psychology, and design theory. Her broad experience makes her a versatile and valuable partner.



### MEGAN MANN

Megan Mann is the founder and principal of [Approach](#), a consulting group that specializes in independent school leadership and crisis management, employee training, investigations, and governance support.

Prior to founding Approach, Megan served as General Counsel and Vice President of Legal Education and Support for the National Association of Independent Schools (NAIS) for five years, where she managed NAIS's legal needs and counseled independent schools on a variety of matters. Prior to joining NAIS, Megan was an employment and independent school attorney, where she served as general counsel to independent schools across the country. Earlier in her career, Megan enjoyed her work in the television and print media arena, along with voice over work that she continues to pursue as a hobby.

Megan serves as a trustee for St. Michael's School (VA) and volunteer on the strategic planning committees of Riverside School (VA) and The New Community School (VA). She and her family (including two fabulously awkward dogs) live in Richmond, Virginia, where her two children attend independent schools. Megan enjoys a juicy fiction novel, a slow jog, and gazing at pretty much any body of water.



### BRAD RATHGEBER

Brad Rathgeber is the president and CEO of [One Schoolhouse](#), a non-profit organization that partners with independent schools to advance their diverse approaches to education. One Schoolhouse has two primary programs, an online, supplemental Academic Program, and the Association for Academic Leaders. Brad has been leading the organization for 12 years. Previously he worked as an administrator and teacher at Holton-Arms School. Brad is an independent school graduate, holds an undergraduate degree from the University of North Carolina, and holds a graduate degree from Dartmouth College.



### BONNIE J. RICCI

Bonnie J. Ricci began as the Executive Director of the [International Council Advancing Independent School Accreditation \(ICAISA\)](#) in the summer of 2019. Throughout her career, she has held numerous positions within independent schools including teacher, advisor, coach, and head of school. Bonnie's passion for accreditation as a tool for growth was sparked when she served on several accreditation visiting teams. Following this passion, she spent a decade providing leadership within the areas of accreditation, professional development, and governance at the Association of Independent Schools in New England (AISNE). Bonnie holds degrees from Williams College and Worcester State University. Analytical by nature, Bonnie is intensely service oriented, and derives deep satisfaction through supporting others in assessing challenges and solving problems. Using these skills, Bonnie has dedicated her career to serving the educational community as a board member, conference presenter, facilitator, consultant, and enthusiastic advocate for accreditation and independent school education.



### ANN MARSH RUTLEDGE

With a belief that the true mark of expertise is curiosity and a willingness to continue learning, Ann Marsh values her work leading research on emerging topics in education. She enjoys partnering with educators and leaders all over the world to design school strategy, innovate programs and systems, and transform teaching experiences. Over the course of her 15 years in education, she has taught and tutored students in grades PK through Grade 6, served as a Learning Specialist, Instructional Coach, and Curriculum Designer, as well as Head of Learning and Innovation for [MV Ventures](#). Ann Marsh is an innovative education leader with a passion for applying research to practice and guiding schools through change to meet their highest potential. She is a frequent speaker, facilitator, and consultant on topics ranging from the future of education, emerging innovation, and organizational strategy to instructional design including Inquiry-based Learning, Competency-based Assessment, and Design Thinking.