



New “Mini” Trustee Series

Registration is now open!

ACIS is excited to offer our members the opportunity to register and participate in three of the webinars that are part of the Independent Schools Association of the Central States (ISACS) 2023-2024 *Trustee Series*. Three, 1-hour webinars on important governance topics will be held each of the following months: August, September, October.

Audience

For trustees of independent schools & heads of school.

Questions

If you have any questions, please contact Alan Smiley at asmiley@acischools.org.

Live webinars will take place via Zoom, 2:00 – 3:00 pm MDT on the following dates:

- Wednesday, August 23, 2023
- Thursday, September 14, 2023
- Thursday, October 12, 2023

To accommodate busy schedules, webinars will be recorded and available to registered schools and their trustees until June 30, 2024.

All trustees and heads who plan to attend the live presentation **MUST** pre-register on Zoom for each webinar.

How to Register as an Individual Trustee

ACIS schools will be registering as a school, and a school representative will convey individual registration information to others in their community directly. Please contact your school to inquire if they have registered on behalf of your community and to request more information.

OTHER DETAILS:

- Trustee Series webinars will be recorded, unless otherwise noted. Any content and/or conversations that occurred in Zoom breakout rooms were not recorded.
- Trustee Series webinar recordings will be available to registered schools to access until June 30, 2024, unless otherwise noted.
- Instructions on how to access the recordings and applicable resources will be sent within 24-48 hours of the live presentation to the contact person registered as well as anyone pre-registered on Zoom for that particular webinar.
- Passwords are not required to access the recordings; however, Trustee Series registrants will be prompted to complete a Zoom On-Demand Online Form before gaining access to each webinar.
- Recordings must only be accessed by schools that registered for the 2023-24 Trustee Series. Please do not share the recording links with others outside your school community. ACIS will contact any non-registrant who completes the online form and will require a registration fee.

Cancellation & Questions?

Cancellation Policy for Virtual Programming

ACIS does not provide refunds for the Trustee Series.

Questions?

Please email Alan Smiley at asmiley@acischools.org.

Please do not contact ISACS directly.

Click [Policies and Disclaimers.docx](#) for policies and disclaimers.

Trustee Series webinars will take place 2:00 – 3:00 pm MDT via Zoom

WEDNESDAY, AUGUST 23, 2023

Board Culture, Roles & Responsibilities

Lynn Wendell, Independent School Governance Expert

Whether you are new to trusteeship or a seasoned board member, it is a good idea to pause and reflect on the best practices and board habits that lead to effective governance. Join this webinar to review the core responsibilities of independent school board members and how your responsibilities as a board member are different from those of the head of school. We will discuss tricky situations you might encounter as a board member and how to handle them, and review aspects of board culture that contribute to board success. This governance

"booster shot" will prepare you for what's ahead as you approach the 2023-24 board cycle.

THURSDAY, SEPTEMBER 14, 2023

Foundations of Governance: Tips & Traps for Trustees

Sara Goldsmith Schwartz, Schwartz Hannum PC

Serving on the board of trustees of an independent school is a significant contribution to the community, and a significant responsibility. This webinar, led by experienced school attorney Sara Schwartz, will utilize real-life hypotheticals to explore key aspects of being an independent school trustee. Topics will include: overview of duties; essential board functions and documents; the ideal board relationship with the head of school; the board's role in a crisis; and recommended action items.

THURSDAY, OCTOBER 12, 2023

Effective Financial Governance for Independent School Trustees

Mary Kay Markunas, National Business Officers Association (NBOA)

Every independent school trustee must effectively steward the school by fulfilling their fiduciary role; the board's partnerships with the head of school and business officer are critical. This webinar will foster a deeper level of fiduciary stewardship and financial governance. Trustees will enhance their understanding of the multi-faceted independent school business model and learn to ask the right questions to inform more strategic discussion. School leaders will learn how best to report information to ensure financial stewardship and long-term sustainability.

Presenters

Lynn Wendell has worked as a consultant at more than 90 independent schools and nonprofits. She served as a trustee at three independent schools and as board chair at San Francisco University High School (CA). In addition, she has served on non-profit boards, board committees, and advisory councils.

Sara Goldsmith Schwartz is the founder and president of Schwartz Hannum PC, a law firm based in Andover, MA, that specializes in education, employment, and labor law. In the course of representing more than 250 educational institutions across the U.S., Schwartz has become a trusted advisor to heads of schools, presidents, board chairs, deans, business officers, and others as independent school leaders tackle and resolve matters of school governance, student and employee disciplinary matters, risk management, sexual abuse allegations, and the myriad compliance documents such as enrollment agreements, school bylaws, student/parent handbooks, and more. She is a cum laude graduate of Yale College and Harvard Law School.

Mary Kay Markunas supports NBOA's professional offerings including the NBOA Annual Meeting, Business Officer Institute, webinars, and online courses, as well as providing resources and support to members. She develops and delivers programs related to independent school business operations, leadership and governance, and nonprofit accounting practices. Markunas

joined NBOA in 2015 after serving as the director of finance and operations at The Avery Coonley School (IL) for 12 years. Before joining the independent school community, she worked in corporate finance at a global corporation and in engineering consulting.