

EXPLORING NEW HORIZONS



33RD ANNUAL LEADERSHIP CONFERENCE • OCTOBER 14-15, 2021

LOCATION

Park Hyatt Beaver Creek Resort & Spa
Beaver Creek, CO

HOTEL RESERVATIONS

Park Hyatt Beaver Creek Resort & Spa
Beaver Creek, CO
(888) 421-1442

Make reservations by September 14, 2021 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 contact the Park Hyatt Hotel Reservations Department at
1 (888) 421-1442 or make your reservation online at:

<https://www.hyatt.com/en-US/group-booking/BEAVE/G-AC21>.

Identify yourself as an attendee of the Association of Colorado Independent
Schools conference.

QUESTIONS?

Visit our website at www.acischools.org

or contact Alan Smiley, Executive Director

(303) 444-2201

CONFERENCE REGISTRATION

EARLY REGISTRATION

(received BY September 14)

- Member schools \$375 per person
- Non-member schools \$400 per person
- ACIS school staff \$225 per person for attending Friday only
- Courtesy Extension (Members Only)

The early registration fee will prevail after
9/14 for member schools that register eight
or more participants.

REGISTRATION

(received after September 14)

- Member schools \$425 per person
- Non-member schools \$450 per person
- ACIS school staff \$275 per person for attending Friday only

REGISTRATION INFORMATION

- **REGISTER** now at www.acischools.org
- **PAY** by mailing your check to:
ACIS, 4000 S. Wadsworth Blvd., Ste. 230,
Littleton, CO 80123
- \$50 discount for the spouses/partners
of conference registrants
- Dinner and Keynote only—\$100.00

**NO REFUNDS FOR CONFERENCE
CANCELLATIONS AFTER SEPTEMBER 14, 2021!**

ACIS LEADERSHIP CONFERENCE SCHEDULE 2021

THURSDAY, OCTOBER 14, 2021

TIME	TRACK/SPEAKER	LOCATION
3:00-5:00 pm	New Trustee Orientation Monique Davis and Dr. Anne-Marie Balzano	Molly Brown
3:00-5:00 pm	Heads' Roundtable <i>For Heads of School Only</i>	Ouray/Tabor
3:30-5:00 pm	Circle of Large School Chairs (School of 400+ students) <i>For Current and/or Rising Board Chairs Only</i>	Gerald Ford
3:30-5:00 pm	Circle of Small School Chairs (School of 399- students) <i>For Current and/or Rising Board Chairs Only</i>	Jack Dempsey
5:30 pm	Registration	Heritage Hall Foyer
5:45 pm	Reception	Heritage Hall Foyer
6:30 pm	Dinner	Mt. Jackson/ Grouse Mtn.
7:15 pm	KEYNOTE: DR. ADAM WEINBERG Leadership Requirements for Boards and School Leaders in Changing Times	Mt. Jackson/ Grouse Mtn.

FRIDAY, OCTOBER 15, 2021

TIME	TRACK/SPEAKER	LOCATION
7:15-8:15 am	Registration and Book Sale	Sawatch Foyer
7:30-8:15 am	Breakfast Buffet	McCoy's Peak
8:30-10:00 am	KEYNOTE: DR. ADAM WEINBERG Current Trends in Post-Secondary Education and the Implications for K-12 Schools	Mt. Jackson/ Grouse Mtn.
10:30-11:45 am	Concurrent Sessions (Morning)	
	① Advancing and Measuring Successful Diversity, Equity and Inclusion Work Within Your Community Dr. Rodney Glasgow	Mt. Jackson
	② National Legal Trends and Practical Takeaways Megan Mann	Grouse Mountain
	③ Evidence-Based Accountability Plans: Measuring Progress Toward Strategic Goals and Accreditation Recommendations Kelsey Vrooman and Dr. Anne-Marie Balzano	Ouray
	④ Board Habits to Foster Generative Thinking and Collective Purpose Kawai Lai and Keara Mascareñaz	Tabor
	⑤ Where Are Your Ideal Families Now? Where Will They Be in 2025? Mike Connor	Molly Brown
11:45 am-12:45 pm	Lunch	McCoy's Peak
12:45-1:30 pm	School-Based and School Staff Affinity Discussion Groups	
1:45-3:00 pm	Concurrent Sessions (Afternoon)	
	① Advancing and Measuring Successful Diversity, Equity and Inclusion Work Within Your Community Dr. Rodney Glasgow	Mt. Jackson
	② Governing Conduct & Keeping School Communities Safe Megan Mann	Grouse Mountain
	③ Measure What Matters: Best Practices for Board Dashboards Kelsey Vrooman	Ouray
	④ Leadership Habits to Create Trust, Connection, and Learning Kawai Lai and Keara Mascareñaz	Tabor
	⑤ Pulling in the Same Direction: Everyone's Role in Advancing the Mission of the School Mike Connor	Molly Brown
	⑥ Leading Schools Today: A Panel of ACIS Heads of School Panel Discussion; Facilitated by Alan Smiley (ACIS Executive Director)	Dempsey

PRESENTATION DESCRIPTIONS

THURSDAY, OCTOBER 14, 2021

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

Collegial Conversation and Collaboration

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

This workshop explores 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.

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

Leadership Requirements for Boards and School Leaders in Changing Times

Dr. Adam Weinberg, President, Denison University

Recent economic, political, and societal developments have permanently altered the educational landscape for K-12 and post-secondary institutions. As a result, new skills and approaches are required from trustees and educational leaders to meet the needs of current and future students and ensure long-term institutional success and prosperity. Strong partnership, nurtured consensus, unwavering commitment, and consistent clarity between boards and educational leaders around topics like mission, community standards, and foundational beliefs are also critical during these defining times. During the evening keynote, Adam will reflect on illuminating aspects of his unique leadership journey, his views on the most complex and pressing challenges facing school leaders today, and the vital roles trustees and school leaders must play to meet these unique times. Examples and suggestions on how to achieve success will also be discussed, with time afforded for questions and answers.

FRIDAY, OCTOBER 15, 2021

Keynote | 8:30-10:00 am

Current Trends in Post-Secondary Education and the Implications for K-12 Schools

Dr. Adam Weinberg, President, Denison University

Colleges and universities have been increasingly confronted with complex challenges in areas of affordability and sustainability, equity and inclusion, rapidly shifting career paths, student safety, civil discourse, new research on effective pedagogy, demand for online alternatives, globalization, and more. K-12 schools face many of the same challenges, and the approaches of colleges and universities to these topics have significant implications for ACIS students and schools. Adam will discuss current and future post-secondary trends in these and other areas, what those directions might mean for K-12 education, and considerations for schools to adequately prepare students for success in higher education and life beyond.

Morning Presentations | 10:30-11:45 am

① Advancing and Measuring Successful Diversity, Equity and Inclusion Work Within Your Community

Dr. Rodney Glasgow

Whether your school is already deeply engaged in ongoing work to enhance the diversity, equity, and sense of belonging with your community or in the early stages of advancing this work, many questions likely abound and the journey is not complete. Where should these efforts start? Who should be involved in the work and how? What are some practical and research-based frameworks and road maps for advancing the efforts? When might you want outside

assistance? How to handle the inevitable challenges, stumbles, and road blocks along the road? How can you measure whether these efforts are having a successful impact? What does success even look like? Rodney will address these and other questions based in part on his years of experience as an independent school teacher, administrator, diversity practitioner, school consultant, and current head of school. Attendees will also benefit from the interactive thoughts and perspectives of other ACIS colleagues. This workshop will provide tangible and practical takeaways and approaches that you can utilize as you work to build a stronger, more inclusive and vibrant community for today and tomorrow.

② National Trends & Practical Takeaways

Megan Mann

In this session, we will explore trends that were evident this past year across the independent school landscape (in addition to all things COVID-19!). What are the past and emerging trends we see, and what can we learn from both?

This past school year, independent schools were mired in COVID-19 mitigation and response, while juggling both old and new issues that come with the responsibility of running a school. We will review some of the trends we've seen emerge from the pandemic, including a renewed focus on the standard of care and liability, the challenges of managing community polarity around politics and DEI, concerns regarding online learning, confusion over accommodations, the evolution of conduct jurisdiction and philosophy, enrollment agreements, and more. Each section will provide a high level overview of the topic at hand, with practical takeaways for your school to consider. Participation and audience discussion is encouraged.

PRESENTATION DESCRIPTIONS

FRIDAY, OCTOBER 15, 2021

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

- ③ **Evidence-Based Accountability Plans:
Measuring Progress Toward Strategic Goals and
Accreditation Recommendations**
Kelsey Vrooman & Dr. Anne-Marie Balzano

Leaders and trustees want their school to be rooted in mission-driven, data-informed decision making, yet many schools struggle to turn strategic plans, visionary initiatives, and accreditation recommendations into action and to effectively communicate progress to the board. Join Kelsey and Anne-Marie as they walk trustees and school leaders through research-based processes for building robust accountability plans. We will explore how to align success metrics to strategic goals and accreditation recommendations, share strategies on how to measure subjective goals such as joyful learners or engaged students, and share examples of effective strategic plan dashboards.

- ④ **Board Habits to Foster Generative Thinking and
Collective Purpose**
Kawai Lai and Keara Mascareñaz

As we emerge from a remarkable time in our lives and in our schools, now more than ever, boards must be generative, and future-focused. How do we become more generative, and why is this important for a board? How do we bring clarity to our collective purpose? What are small changes we can make on our board to create a more meaningful impact for the school? This session is designed for board chairs, committee chairs, and heads of school who are interested in forming new board habits to help their board use a future-focus and generative thinking to respond to the needs of their community.

- ⑤ **Where Are Your Ideal Families Now?
Where Will They Be in 2025?**
Mike Connor

Imagine identifying in real time where the most mission-appropriate families in your market live – those who share the characteristics, values, and attitudes of the families you would like to replicate at your school. These families may represent your school's most ideal family prospects who share interest in mission-dependent flagship programs at your school such as arts, athletics, and social justice. Where do the families live now? Where will they be in 2025?

The *Enrollment Feasibility and Forecasting* approach, pioneered by Connor Associates for independent schools, is popular with boards that want to make enrollment and income projections based on highly customizable data. Enrollment managers report that this approach typically gains 25 new applications and 12 new enrollments, where it pays for itself ten times over. Its purpose is to highly target areas where resources should be spent on marketing—areas where you will get the most bang for your buck now and in the foreseeable future.

Afternoon Presentations | 1:45-3:00 pm

- ① **Advancing and Measuring Successful Diversity, Equity
and Inclusion Work Within Your Community**
Dr. Rodney Glasgow

Whether your school is already deeply engaged in ongoing work to enhance the diversity, equity, and sense of belonging with your community or in the early stages of advancing this work, many questions likely abound and the journey is not complete. Where should these efforts start? Who should be involved in the work and how? What are some practical and research-based frameworks and road maps for advancing the efforts? When might you want outside assistance? How to handle the inevitable challenges, stumbles, and road blocks along the road? How can you measure whether these efforts are having a successful impact? What does success even look like? Rodney will address these and other questions based in part on his years of experience as an independent school teacher, administrator, diversity practitioner, school consultant, and current head of school. Attendees will also benefit from the interactive thoughts and perspectives of other ACIS colleagues. This workshop will provide tangible and practical takeaways and approaches that you can utilize as you work to build a stronger, more inclusive and vibrant community for today and tomorrow.

- ② **Governing Conduct & Keeping School Communities Safe**
Megan Mann

While the goal of safety has always been clearly paramount for our school leaders, there often exists confusion about what reasonable steps we should take to enhance that safety. For example, how should schools handle boundary-blurring employee conduct or off-campus student conduct? Beyond safety, how should your school handle conduct that might negatively impact the reputation of the school? Does it matter if this conduct occurs off campus at a private event? What conduct is appropriate to govern and how? These are just a few of the questions our school leaders face and which we will tackle in this interactive presentation. Spoiler Alert: There are very few clear-cut answers! There are, however, common issues we see across the country which we will discuss together. Additionally, we will review different hypothetical scenarios so that attendees can discuss these challenges and learn from each other. Our goal in this session will be to raise awareness of these concerns and talk through the different ways a school can address the concerns of its own community.

- ③ **Measure What Matters: Best Practices for Board
Dashboards**
Kelsey Vrooman

Paul Drucker is credited as saying, "What gets measured gets managed." With this caveat in mind, the data included on a board dashboard is a critical tool in directing the board's attention and focusing the work of committees. While the interface is important, the true power of a board dashboard comes when it is used to engage board members at all levels of data literacy in dynamic and strategic discussions about the past, present, and future of the school. Join Kelsey to dive into best practices for board dashboards, including key indicators of financial health, enrollment strength, and student success. This session will also cover how to build early warning systems to address trends before they become crises.

PRESENTATION DESCRIPTIONS

FRIDAY, OCTOBER 15, 2021

Afternoon Presentations *(continued)* | 1:45-3:00 pm

④ **Leadership Habits to Create Trust, Connection and Learning**
Kawai Lai and Keara Mascareñas

School leaders often carry the burden of the needs and culture of faculty, students, and community, especially during this past unprecedented year. What does it mean to be a leader today? How do we focus on what's next while honoring the past? This session will share habits you can develop as a leader to create greater trust, connection, and learning with your team. These habits are practical actions you can apply immediately and that can have a ripple effect, leading to greater purpose and outcomes. This session is designed for school leaders and administrative teams.

⑤ **Pulling in the Same Direction: Everyone's Role in Advancing the Mission of the School**
Mike Connor

"Schools aren't businesses!" "I'm a teacher, not a cheerleader!"
"Marketing isn't my job!"

Sound familiar?

If you work in enrollment management, fundraising, or marcom, do you find it difficult to convince faculty, staff, the head of school, the business manager, the board of trustees, or others about the value of marketing? While many may equate marketing with external promotion, public relations, or advertising, making the most of these external initiatives begins with a cohesive and collaborative internal marketing effort that serves everyone's individual interests and the success of the school as a whole. By listening and looking for internal opportunities to collaborate, by listening carefully to those you seek to serve internally and externally, and by making sure all stakeholders understand the important interdependence of independent schools, a school can maximize its marketing and advance its mission.

⑥ **Leading Schools Today: A Panel of ACIS Heads of School**
Panel: *Mike Davis (Colorado Academy),
Julie Bragdon (Montessori School of Denver),
Jeff Leahy (Colorado Rocky Mountain School),
Sumant Bhat (Stanley British Primary School),
Adriana Murphy (St. Elizabeth's School)*
Facilitator: *Alan Smiley (ACIS Executive Director)*

Leading an independent school today is unlike any other period in history. Join a panel of ACIS heads from various backgrounds, regions, tenures as head, gender identities, type of school, and student populations as they explore some of the joys, challenges, and unique aspects of current school leadership. Developing and maintaining healthy board/head partnerships, crisis management tips, navigating polarizing community topics, developing future leaders, the changing mindsets of students, parents, and faculty, and the modern job description of a head of school are just some of the topics that will be explored. Strategies for how boards, administrative teams and heads can work together to meet these challenges and ensure institutional success will also be discussed. Ample time will be allowed for audience participation via questions and answers.

SPEAKER BIOS: KEYNOTE SPEAKER



DR. ADAM WEINBERG

Adam Weinberg became the 20th president of Denison University (www.denison.edu) in 2013. He has focused on positioning Denison in ways that address the major issues facing higher education in the 21st century: affordability, career readiness, internationalization, civic education, learning outcomes, and social inclusion.

Under Adam's leadership, Denison has expanded the curriculum with a new generation academic and global programs, as well as a deepening of the arts, including the construction of the *Michael D. Eisner Center for the Performing Arts*. Denison's new programs in Global Commerce, Data Analytics, Financial Economics, Narrative Journalism, and Health, Exercise and Sports Studies are forging new pathways for the liberal arts.

A native of Texas, Adam's passion for ice hockey took him to New England, where he attended Deerfield Academy and Bowdoin College. He studied at Cambridge University before earning his master's and doctoral degrees in sociology at Northwestern University. He has published widely.

Adam is a member of The Council on Foreign Relations. He has served on a variety of national and local boards, including The Talloires Network, InterAction, The Works, The Great Lakes College Association, The Ohio Foundation for Independent Colleges, and the Alliance for International Education and Cultural Exchange.

SPEAKER BIOS



DR. ANNE-MARIE BALZANO

Anne-Marie Balzano is Mission and Data's (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-leveled 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*.



MIKE CONNOR

Mike Connor is president of Connor Associates Strategic Services (www.connor-associates.com) and co-author of the NAIS book, *Marketing Independent Schools in the 21st Century*. His consulting work includes predictive demographic enrollment modeling, internal image audits, enrollment management assessments, external image audits, branding/messaging/website development, and strategic planning. Mike presents widely for independent school leaders, nationally and internationally. He has worked in nearly every position at independent K-12 schools during his 30 year career. Mike has consulted with several ACIS schools, including Aspen Academy, Denver Academy, Dawson School, Vail Mountain School, and Friends School.



MONIQUE DAVIS

Monique Davis (www.linkedin.com/in/monique-davis01) consults with schools regarding board development and governance, strategic planning, branding and marketing, admission strategies and capital campaign implementation. She has led workshops on board governance and 21st century boards at the NAIS Annual Conference. She has served as a trustee at the Montessori School of Denver for over twenty years, with six of those years as board chair. With four children who have attended both ACIS schools and public schools, Monique brings a broad perspective to her work.



DR. RODNEY GLASGOW

Rodney Glasgow is an innovative educational leader, published author, renowned keynote speaker, diversity practitioner, and current head of school at Sandy Spring Friends School. He has held classroom, boardroom, and administrative leadership positions at several nationally-recognized independent schools.

Along with his teaching and administrative experience in the independent school world, Rodney is well-known as a diversity advocate and facilitator who believes deeply in fostering a sense of belonging as a tool for nurturing brave and just spaces. He is founder and chair of the National Diversity Practitioners Institute for educators and administrators and the NAIS Student Diversity Leadership Conference. He is also president and principal consultant of the Glasgow Group, LLC (www.glasgowgroup.org), which works with schools, individuals, and organizations to create and promote equitable and just practices that harness the power of diversity and inclusivity. Rodney is the recipient of the *People of Courage Award* from the City of Worcester and a featured writer in *"One Teacher in Ten in the New Millennium: LGBT Educators Speak Out About What's Gotten Better...and What Hasn't."*



KAWAI LAI

Kawai Lai is a designer and facilitator partnering with K-12 leaders in planning for the future with an equity lens. She is a co-author of *The New Team Habits*®, which provides practices for leaders to build better habits for team learning, meetings, and projects. She started VizLit (www.vizlit.org) to unleash the visual

mind of every learner, formerly served as Vice President of Innovation at the National Association of Independent Schools (NAIS), and helped launch and grow *Education Elements*. Prior to her career in education, Kawai was at Deloitte Consulting. She has an MBA from the University of California, Berkeley and a BA in Mechanical Engineering from Southern Methodist University. Kawai serves as a trustee on the boards of Compass High School (San Mateo, CA) and Girls Middle School (Palo Alto, CA) as well as an advisory board member for San Francisco Girls High School launching in 2021.



MEGAN MANN

Megan Mann is the legal counsel and a vice-president for the National Association of Independent Schools (www.nais.org). In her role, Megan supports the organization's legal and risk management needs; engages in advocacy efforts on behalf of NAIS schools; and she provides legal education and support to member schools. Prior to joining the NAIS

team, Megan was an employment and independent school attorney, acting as general counsel to independent schools across the country. Megan proudly serves as a trustee for both One Schoolhouse and St. Michael's School. She is also a voice over artist, mother of two independent school children, and she loves a good bourbon and a good novel.



KEARA MASCAREÑAZ

Keara Mascareñaz leads August Public's (www.aug.co) *Empowered Decision Making* practice. She focuses on human-centered ways of working and how to scale a culture of inclusion, learning, and innovation in large, complex systems. Keara has supported org-wide change across sectors, working with everyone from agile start-ups to historic, bureaucratic institutions. She believes

diverse teams are better teams and that we all deserve joy and choice. Keara is co-author of *The New Team Habits* and the toolkit creator for *The NEW School Rules: 6 Practices for Thriving and Responsive Schools*. She has an MA from New York University and a BA in History and Intercultural & International Studies from Claremont McKenna College.



KELSEY VROOMAN

Kelsey Vrooman is the co-founder and partner of Mission & Data (www.missionanddata.com), and a recognized expert on the use of quantitative and qualitative data to improve practice in non-profit organizations. She specializes in creating mission-driven, data-informed dashboards and visualizations, and in coaching independent schools and organizations on the transformative use of research and data to drive progress.

Kelsey is the co-founder of the Association of Technology Leaders in Independent Schools, and former director at the National Association of Independent Schools (NAIS), where she designed the market data visualization tool *Market View*, participated in *Jobs to be Done* research, and helped launch the *Composite Financial Index*. She also oversaw NAIS' online professional development program and staffed the *Institute for New Heads*, the *Fellowship for Aspiring Heads of School*, *Leadership for Partnership*, and the *School Leadership Institute*. Kelsey began her career as an independent school teacher and director of educational technology, winning the *Emerging Leader Award* from the International Society of Technology in Education and the *Teacher of the Future Award* from NAIS.

ACIS LEADERSHIP CONFERENCE 2021 SPONSORS

ACIS is grateful for the generosity and support of its corporate partners. Their commitment helps make this conference and all of the many other ACIS offerings possible. Their services also help to strengthen our member schools.

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