

Don't Go Near the Water

By CLAUDIA M. DAGGETT, President, Independent Schools Association of the Central States (ISACS)

Trustees are the school's stewards, charged with the assignment of ensuring that it flourishes for future generations. This is a heavy responsibility. I have learned that it is tempting, when working through a rough patch, for trustees to generously offer their time and attention to fill a perceived gap in the operations of the school. There is often the sense that, because of an extraordinary situation or the belief that the school is out of the mainstream, conventional wisdom on independent school governance does not apply.

I urge you to consider the contrary. Principles of good practice are never *more* important than when dealing with adversity. Should extraordinary circumstances require more time of trustees? *Absolutely!* Should extraordinary circumstances require trustees to become active in the daily life of the school? *Good heavens, no!*

Instead of jumping in, ask for more information from those responsible for operations—and get help. Call your association executive to serve as a thinking partner; engage a consultant; if necessary, replace your head with an interim. But refrain from “doing the work” yourself. When parents, teachers, and the administrative team see trustees actively engaged in operations, confusion about roles reigns and it is very difficult to go back. This is *not* what you need in extraordinary circumstances. An old friend of mine suggests that, once the board has crossed into that realm, returning to best practices is a bit like “putting the toothpaste back in the tube.”

In my work as an association executive, I regularly field phone calls from board chairs and heads as they wrestle with concerns. Also in my role, I frequently facilitate workshops for boards of independent schools on the topic of best practices in governance. When I hear a tale of the earnest desire to serve the school manifesting itself in trustee involvement in the day-to-day operations of the school, I worry for the health of that institution. If you will forgive humor in the face of darkness, I will tell you that I imagine John Williams's well known *Jaws* theme—that ominous bass-heavy score—as I listen to the story.

Scenarios from the field:

A) Financial crisis. The school is running an operating deficit without significant reserves, and cash flow challenges beg uncertainty about making payroll. The board insists that the business officer present every individual expenditure to the treasurer for approval. This makes the board feel more confident in

a precarious situation, but the head and business officer are left feeling undermined and the line between governance and operations has become murky for all observers. *A better response:* The board establishes a practice of more frequent, detailed financial reports from the business office and, with the head of school, considers strategies for better solvency in consultation with the school's auditor and bank.

B) Enrollment shortfall. Admission numbers are significantly short of projections. A trustee volunteers to meet with the admission director to evaluate how well suited s/he is for the work. After several encounters, the trustee takes his/her concerns to the board, which, in turn, demands the admission director's resignation. *A better response:* The board carefully analyzes the data in admission reports, ensures that a performance evaluation system is in place, and shares its concerns with the head of school with full understanding that the head owns all personnel decisions.

C) Head-of-school absence. The head of school has had a sudden health crisis and is unable to work for a period of time. The board chair, with a clear sense of strategic direction and current initiatives, decides to fill the role until the head can return. On the first day of the head's absence, the board chair settles in at the head's desk to tackle efforts at the top of the list. *A better response:* With the head's participation, if possible, an acting head is identified—either from the existing staff or from a pool of outside professional school leaders.

There are many variations on these themes and many other stories, of course. Resist temptation. Remember that John Williams score, and *don't go near the water.*

Tip for New Board Chairs

BEGINNING AS NEW BOARD CHAIR CAN BE DAUNTING IF the previous chair had a long tenure. One trustee facing this situation turned to advance work (boardsource.org, 2015). Knowing that many trustees had only known one board chair, Page Knudsen Cowles, National Board Chair, Trust for Public Land, reached out. “With the former chair's blessing, I decided to contact each of my fellow board members in person by phone before my new term began. I was eager to learn how each one felt about the board's culture...and what I could do to be a good board chair in each of their eyes. I also felt it was important to show my respect for each one by asking for his or her opinions and perspectives before jumping into the job.” Reaching consensus on difficult topics was made easier immediately because of this advance work.