



January – June

2021

TRUSTEE SERIES

AUDIENCE:
INDEPENDENT SCHOOL TRUSTEES & HEADS

A VIRTUAL PROGRAM
7 ONE-HOUR WEBINARS

WEBINARS WILL TAKE PLACE VIA ZOOM
3:00 – 4:00 PM CENTRAL / 4:00 – 5:00 PM EASTERN

THURSDAY, JANUARY 14

What's Ahead: Trends & Data for Your Board

DONNA OREM, NATIONAL ASSOCIATION OF INDEPENDENT SCHOOLS (NAIS)

What is the national landscape for independent schools? Orem will examine national trends and data to support your board's strategic thinking for short and longer terms.



DONNA OREM was named president of NAIS in November 2016 after serving as interim president since November 2015. Before becoming NAIS president, Orem served as the NAIS chief operating officer for 11 years. She joined NAIS in 1998 as the vice president for educational leadership, later becoming the vice president for strategic initiatives and research. Prior to joining NAIS, she worked at the Council for Advancement and Support of Education (CASE), and she also served as associate director for The American Association of University Women. Orem is the co-author of the *NAIS Trustee Handbook, 10th edition* and the author of numerous books and articles.

WEDNESDAY, FEBRUARY 17

Top Ten Risk Management Topics for Trustees & Heads in 2021

SARA GOLDSMITH SCHWARTZ, SCHWARTZ HANNUM PC

In this session, Schwartz will facilitate a conversation about 2021's top legal issues facing independent school trustees and heads. Current hot topics will be discussed such as: good governance, enterprise risk management; head of school hiring, management and separation; community unrest; foundational documents before, during and after COVID-19; federal funding; and anti-trust considerations. *ISACS will record this webinar which will be made available to those who request it directly from Sara Schwartz.*



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. Schwartz is a trusted advisor to independent schools and higher education helping them 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.

WEDNESDAY, MARCH 17

Racially Just Decision Making for Boards

HOWARD STEVENSON, UNIVERSITY OF PENNSYLVANIA

Making decisions that have racial and/or political implications creates challenge for boards of trustees. Learn practical approaches from Dr. Stevenson on how to work with differences to reach decisions that move the school toward greater racial justice.



HOWARD STEVENSON, PHD is the Constance Clayton Professor of Urban Education, Graduate School of Education at the University of Pennsylvania. Stevenson is the executive director of the Racial Empowerment Collaborative, designed to promote racial literacy in education, health, community and justice institutions. His most recent research focuses on helping children and adults develop and use assertive coping strategies during face-to-face microaggressions. Key to this racial healing work is the use of culture to reduce in-the-moment threat reactions and increase access to memory, physical mobility, and voice.

WEDNESDAY, APRIL 21

Head & Board Chair Relationships

LUCINDA LEE KATZ, FORMER HEAD OF SCHOOL & BOARD CHAIR

Katz's vast experience as both a head of school and a board chair informs the foundational information she'll share for your team's productive relationship. A case study will be used to explore an issue from these dual perspectives.



LUCINDA LEE KATZ is a senior consultant for Carney Sandoe & Associates' Consulting Group where she focuses on board governance, and executive coaching. In 2018, she concluded a 14-year tenure as the head of school of Marin Country Day School (CA). Prior to MCDS, she worked with Mayor Daley in Chicago as the chief education officer and served as head of school and principal at The University of Chicago Laboratory Schools (IL) from 1986 to 2002. Katz served on the NAIS Editorial Board, vice chair of NAIS, past president for the California Association of Independent Schools (CAIS), board chair for ISACS, and also served on three private school boards in CA. She has been a keynote and panelist speaker and has made guest appearances on Oprah.

BONUS SESSION FOR CURRENT & INCOMING BOARD CHAIRS

WEDNESDAY, MAY 5

Board Chair Roundtable

MARY MENACHO, ISACS & MARK BROOKS, MADISON COUNTRY DAY SCHOOL

Join us for a facilitated conversation on issues board chairs confront. Former board chairs themselves, Menacho and Brooks invite your engagement to share and hear from peers.



MARY MENACHO was appointed ISACS executive director in 2020. She has served independent schools for over 40 years as teacher, middle school director, academic dean, head of school, and association director. A certified leadership coach, Menacho holds an MA from Santa Clara University and a BA from University of Oregon. She has served independent school boards as trustee and board chair and speaks and writes on leadership and best practices in independent schools.



MARK BROOKS is the interim head of Madison Country Day School (WI), after having served as head of The Center for Early Education (CA) and of Pilgrim School (CA). Prior to moving into independent school leadership, Brooks was associate general counsel for Honda North America and vice president and general counsel for SeeBeyond Technology. He has served as a trustee for NAIS and as the president of the board of the CAIS.

THANKS TO THE TRUSTEE SERIES SPONSORS

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WEDNESDAY, MAY 19

The Best Board for Your School

IAN SYMMONDS, IAN SYMMONDS & ASSOCIATES

The culture of your board is a self-sustaining system that tends to reinvent itself even as trustees and leadership change. Symmonds will help your board explore how to sustain the strengths of your board culture and how to overcome areas for change.



IAN SYMMONDS is the founder, president, and chief strategist at Ian Symmonds & Associates (ISA). In 2003, Symmonds started ISA with a computer, cell phone, and a dream of using his skills to transform the education landscape. After serving four private schools, colleges, and universities over 15 years as a senior officer, turning around enrollment and strategy in the process, he launched Ian Symmonds & Associates Inc. Nearly 20 years, 1,000 clients, and 4 million air miles traveled later, he has seen more schools, colleges, universities, and non-profits than any other consultant in America.

WEDNESDAY, JUNE 16

Board Fundamentals for 2021-22

LYNN WENDELL, INDEPENDENT SCHOOL GOVERNANCE EXPERT

Wendell, an independent school governance expert, will lead this Trusteeship 101 session that will benefit new and experienced trustees as your board anticipates the 2021-22 year ahead. *The recording of this webinar will be available until August 31, 2021.*



LYNN WENDELL has worked as a consultant at more than 70 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.

REGISTRATION DETAILS & FEE

ONLY ONE PERSON FROM YOUR SCHOOL NEEDS TO REGISTER AT [ISACS.ORG/TRUSTEESERIES](https://isacs.org/trusteeries)

- Webinars will take place via Zoom at 3:00 – 4:00 pm central/4:00 – 5:00 pm eastern.
- \$250/school for 7 webinars.
- Approximately one week prior to each Trustee Series webinar, ISACS will send a confirmation email to the contact person who registered on the ISACS website with details of the upcoming webinar including the pre-registration Zoom link.
- All trustees and heads who plan to attend the live presentation must pre-register on Zoom for each webinar.
- To accommodate busy schedules, webinars will be recorded and available (password-protected) to registered schools until June 30, 2021, unless otherwise noted.
- There will be no refunds for the Trustee Series.

Questions? Contact Karen Zeitlin at karen@isacs.org.

REGISTER YOUR BOARD TODAY