

# ISACS 2022-23 TRUSTEE SERIES

AUDIENCE:  
INDEPENDENT SCHOOL  
TRUSTEES &  
HEADS

A VIRTUAL  
PROGRAM  
11 ONE-HOUR  
WEBINARS

WEBINARS WILL TAKE PLACE VIA ZOOM

3:00 – 4:00 PM CENTRAL/  
4:00 – 5:00 PM EASTERN

TRUSTEE SERIES SPONSOR



**THURSDAY, AUGUST 25, 2022**

### Maximizing Board Culture & Communication

ROB EVANS, PSYCHOLOGIST, AUTHOR & SCHOOL CONSULTANT

The long-term success of a school depends crucially on its culture, its shared understandings about purpose, and process. An effective board operates in ways that both reflect and reinforce the school's culture. The stresses of the past three years have forced many schools and boards out of not just their comfort zone but their culture zone. How can a board gauge and improve the well-being of its own contribution to the school's culture? What role does the board play in the ability of the head of school to fulfill their role — and be sustainable? Evans will outline key steps and lead an interactive discussion about these issues.

**THURSDAY, SEPTEMBER 15, 2022**

### Effective Structures, Processes & Practices for Board Success

LYNN WENDELL, INDEPENDENT SCHOOL GOVERNANCE EXPERT

You understand the important governance role the board plays in providing effective school leadership, but do your existing board structures, processes, and practices support your work as well as they could? We will discuss how boards can be sure that they are set-up for success. Topics will include: setting annual board and committee goals, the important roles of board committees and committee chairs, the role of the board's executive committee, the annual board calendar, and more. Bring your questions.

**THURSDAY, OCTOBER 13, 2022**

### Engaging with Stakeholders: How Boards Can Calm Rather than Fan the Flames

MARC T. FRANKEL & ABIGAIL DELESSIO, TRIANGLE ASSOCIATES

School communities often mirror the social and cultural tensions and conflicts abroad in the larger society. While the work of restoring peace falls mainly on administrators, board members must be "allies in calm" with heads of school and avoid actions that predictably make the situation worse. Frankel and DeLessio will explore the board's often misunderstood role in stakeholder engagement and develop a set of practices for trustees to follow both in good times and when conflagrations erupt in the community.

**THURSDAY, NOVEMBER 17, 2022**

### Vision & Strategy Design for a New Era

TIM FISH, NATIONAL ASSOCIATION OF INDEPENDENT SCHOOLS (NAIS)

Rethink strategic planning in this energizing session designed to provide the context and tools needed to gain a clearer picture of the future and to develop an effective vision and strategy for a new era. Fish will reflect on strategic planning used by many schools and share insights on practical ways for school teams to engage strategic design that supports long-term sustainability and differentiation.

**THURSDAY, JANUARY 12, 2023**

### What's Ahead: Trends & Data for Your Board

DONNA OREM, 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.

**THURSDAY, FEBRUARY 16, 2023**

### Supporting DEI+ at the Board Level

SUMANT BHAT, STANLEY BRITISH PRIMARY SCHOOL

It has become increasingly important for independent schools to have clarity around their commitment to diversity, equity, and inclusion. While much of this work rightfully lives at the operational level, the board can play an important role in supporting the head of school, advancing the strategic vision of this work, and providing accountability for the progress, all while remaining at the right altitude. This webinar will provide examples of ways to elevate your board's work around DEI including creating a board committee, writing an inclusion statement for your school, intentionally building your board's cultural competency toolbox, and engaging in scenario discussions.

**THURSDAY, MARCH 16, 2023**

### NAIS Legal Updates for Boards

MEGAN MANN, NAIS

National Association of Independent Schools' Legal Counsel Megan Mann will cover the latest legal trends and issues facing independent schools across the nation.

**THURSDAY, APRIL 13, 2023**

### Effective Head Support & Evaluation

TERRY MOORE, ISM EXECUTIVE CONSULTANT

Moore will present the ISM model for effective Head Support and Evaluation. As we move away from a pandemic mindset and toward an endemic one, never has head support and evaluation been more important. In this interactive webinar, Moore will help participants understand why effective head support and evaluation is mission-critical, and prescribe a simple how-to, step-by-step process based on ISM's 50 years of research and recommendations for effective practice. This webinar will be helpful to heads of schools and board members responsible for head evaluation.

**THURSDAY, MAY 18, 2023**

### Looking to the Future: Governance & Leadership Trends Boards Should Consider in 2023-2024

ANNE-MARIE BALZANO, MISSION & DATA

Your board can anticipate topics and trends to be aware of as you plan for the 2023-24 year through this webinar. Mission & Data analyzes national trends; Balzano will provide a data analysis preview to help strategically position your board's work to anticipate what's next for your school.



**ROBERT EVANS**, EdD is a psychologist, author, and school consultant. He has worked with more than 1,700 schools, many of them ISACS members, on a wide range of issues, including board governance challenges. His interests are in leadership, helping schools manage change, improving adult relationships within schools, and crisis intervention. He is the author of many articles and three books, including *Seven Secrets of the Savvy School Leader: A Guide to Surviving and Thriving* and *The Human Side of School Change*. His newest book, *Hopes and Fears: Working with Today's Independent School Parents*, co-written with Michael Thompson, was published by the National Association of Independent Schools (NAIS).



**LYNN WENDELL** has worked as a consultant at more than 90 independent schools and non-profits. 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.



**MARC FRANKEL**, PhD is a senior consultant and partner in Triangle Associates, a consultancy specializing in higher, independent, and international education. He facilitates governance workshops, leadership development programs, and strategic planning and coaches independent school leaders. He has developed evaluation methodologies for boards and senior school leaders and co-founded the School Leadership Institute for NAIS. Frankel is the author of articles and white papers on governance and leadership issues. Frankel is a member of the board at the Wildwood School (CA).



**ABIGAIL DeLESSIO** is a senior consultant and partner at Triangle Associates. DeLessio partners with independent and international schools to provide strategic direction, focus, and insight, ensuring the identification and implementation of sustainable, strategic goals. She has led two school boards,

including chairing the board of managers at Hong Kong International School (HKIS), one of the premier independent schools in Asia.



**TIM FISH** is the chief innovation officer at NAIS and a member of the Strategy Lab team, where he develops partnerships with member schools to co-create tools and frameworks that build capacity for designing and implementing demand-side innovation. He has deep roots in independent schools and a long history at McDonogh School (MD) where he served as the school's associate headmaster. In addition, Fish was the founding president and CEO of the FolioCollaborative, a nonprofit of more than 175 schools worldwide, focused on building a flexible faculty/staff development process, and is the co-author of *Leadership and Technology at Independent Schools*. He has served on six non-profit boards and currently serves on the board of Viewpoint School (CA).



**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 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, 10<sup>th</sup> edition*, and the author of numerous books and articles.



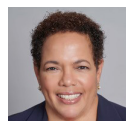
**SUMANT BHAT** is the head of school at Stanley British Primary School (CO), a TK-8 progressive independent school with a focus on social-emotional learning, social justice, and joyful learning. Before Stanley, Bhat was the head of middle school at St. Anne's Episcopal School (CO). He also worked as a department chair, dean of students, helped lead diversity work, and been actively involved in admissions in his different school communities from New Jersey to Boston to Colorado.



**MEGAN MANN** is legal counsel and a vice-president at NAIS. In her role, Mann supports the organization's legal and risk management needs, engages in advocacy efforts on behalf of NAIS schools, and provides legal education and support to member schools. Prior to joining NAIS, Mann was an employment and independent school attorney, acting as general counsel to independent schools across the country. She is a trustee for St. Michael's Episcopal School (VA) and One Schoolhouse.



**LUCINDA LEE KATZ**, PhD is a board governance consultant and executive coach. 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, was 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 made guest appearances on Oprah.



**IRVENIA WATERS**, MBA is an executive coach, team performance coach, and consultant. She brings to her work nearly three decades of experience in management consulting, strategy planning and execution, leadership development, and group facilitation. She has worked with dozens of independent schools and nonprofits and been a leader on independent school and nonprofit boards.



**TERRY MOORE** has been with ISM since 2002. He recently completed a three-year assignment at St. Mary's School (CA) where he served as the head of finance, operations, and advancement. During that assignment, he continued to consult for ISM. He has served more than 200 schools onsite since 2002, with many school leaders returning for additional advice year after year. He also acts as a senior writer for ISM's publications, including *Ideas & Perspectives*; created the ISM FAST® program (ISM's cutting-edge financial aid tool), speaks at various conferences, including NBOA, NYSAIS, CAIS, FISBO, and AISNE, and leads ISM workshops and webinars.



**ANNE-MARIE BALZANO**, EdD is Mission and Data's senior governance strategist, where 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 NAIS, she possesses a unique and multi-leveled perspective of the educational landscape and the demands of supporting leadership and governance development. She facilitates board retreats and educates trustees on effective governance practices and trends, supports resilience in heads of school, and builds a positive board culture. Balzano also is the chief editor of *The Board Chair Handbook* and the host of NAIS's governance podcast, *The Trustee Table*.

## BONUS SESSIONS

FOR CURRENT & INCOMING BOARD CHAIRS ONLY

These webinars will not be recorded.

### THURSDAY, DECEMBER 1, 2022

#### Board Chair Roundtable I

MARC FRANKEL & ABIGAIL DELESSIO, TRIANGLE ASSOCIATES

Join us for a facilitated conversation on issues board chairs confront. Frankel and DeLessio invite your engagement to share and hear from peers.

### THURSDAY, MAY 4, 2023

#### Board Chair Roundtable II

LUCINDA LEE KATZ, FORMER HEAD OF SCHOOL & BOARD CHAIR & IRVENIA WATERS, FORMER BOARD CHAIR & EXECUTIVE COACH

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

## REGISTRATION FEES & DETAILS

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

- \$600 per school for ISACS member schools for 11 one-hour webinars.
- \$700 per school for non-member schools for 11 one-hour webinars.
- Webinars will take place via Zoom at 3:00-4:00 pm central/4:00-5:00 pm eastern.
- Prior to each webinar, ISACS will send an email to the contact person 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 to registered schools until June 30, 2023, unless otherwise noted.
- There will be no refunds for the 2022-23 Trustee Series.

SAVE THE DATE - REGISTRATION WILL OPEN SOON

Questions? Contact Karen Zeitlin at [karen@isacs.org](mailto:karen@isacs.org).