



# 2023|24

August 2023 - May 2024

## TRUSTEE SERIES

A VIRTUAL PROGRAM FOR INDEPENDENT SCHOOL TRUSTEES & HEADS

10 ONE-HOUR ZOOM WEBINARS  
3:00–4:00 PM CENTRAL/4:00–5:00 PM EASTERN  
RECORDINGS AVAILABLE UNTIL 6/30/24

### SERIES OVERVIEW

Wednesday, August 23, 2023

**Board Culture, Roles & Responsibilities**  
Lynn Wendell, Independent School Governance Expert

Thursday, September 14, 2023

**Foundations of Governance: Tips & Traps for Trustees**  
Sara Goldsmith Schwartz, Schwartz Hannum PC

Thursday, October 12, 2023

**Effective Financial Governance for Independent School Trustees**  
Mary Kay Markunas, National Business Officers Association (NBOA)

Thursday, December 14, 2023

**Wearing Three Hats: Trustee-Parent Dilemmas**  
Robert Evans, Psychologist, Author & School Consultant

Thursday, February 15, 2024

**Futureproofing Your Board**  
Greg Bamford & Carla Silver, Leadership+Design

Thursday, March 14, 2024

**DEI & the Board of Trustees: Continuing the Work**  
Valaida Wise, Val Wise Consulting

Thursday, April 25, 2024

**Strategic Small School Governance for a New Era**  
Brooke Carroll, Acies Strategies, Consultant & Author

Thursday, May 16, 2024

**What's Next Now? Planning for 2024/25**  
Tim Fish, National Association of Independent Schools (NAIS)

### BONUS WEBINARS

For current and incoming board chairs only.  
These sessions will not be recorded.

Thursday, December 7, 2023

**Board Chair Roundtable I**  
Lucinda Lee Katz, Former Head of School & Board Chair  
Irvania Waters, Former Board Chair & Executive Coach

Thursday, May 2, 2024

**Board Chair Roundtable II**  
Georgy Ann Peluchowski & Stephanie Rogen, Greenwich Leadership Partners

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2023|24 TRUSTEE SERIES  
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## 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.



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.

## 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 also 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.



Sara Goldsmith Schwartz is the founder and president of Schwartz Hannum PC, a law firm which 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.

## 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.



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.

## Thursday, December 14, 2023 **Wearing Three Hats: Trustee-Parent Dilemmas**

Robert Evans, Psychologist, Author & School Consultant

The relationship between trustees and parents has always been complex. It begins with the closest of connections when the trustee also is a parent at the school. Wearing two hats—as steward and customer—presents a range of challenges. But trustees also have a third hat when they deal with parents, especially those who second-guess and criticize teachers and seek special treatment for their children. What are the best ways to manage these situations? In this webinar, Evans will outline concrete steps for successful coping.



Robert Evans, EdD is a psychologist, author, and school consultant. He has worked with more than 1,700 schools on a 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 latest book is *Hopes and Fears: Working with Today's Independent School Parents*, co-written with Michael Thompson and published by NAIS.

## Thursday, February 15, 2024 **Futureproofing Your Board**

Greg Bamford & Carla Silver, Leadership+Design

Most trustees know that their primary role is to hold the school in trust and to steward it into the future. However, most boards tend to focus on the present and – at best! – think about the next 5-7 years. Thinking like futurists allows boards to consider a longer-term direction and be more likely to shape the future rather than simply react to it. Trustees should be thinking about playing the long game, and thinking like a futurist is a mindset that we can develop, practice, and apply to board work. Embracing futurist thinking at the board level leads to higher trustee engagement, more fulfilling work, and a board that is focused on strategic thinking and generative governance. We'll introduce fundamental frameworks for bringing futurist thinking to the boardroom: identifying the signals of our possible futures, using scenarios to sharpen strategic thinking, and framing strategic questions to guide you toward your preferred future.



Greg Bamford is a co-founder and senior partner of Leadership+Design. Prior to this, he was associate head of school for strategy and innovation at Charles Wright Academy (WA) and head of school at Watershed School (CO). He is currently on the board for his alma mater, The Overlake School (WA) and on the advisory board for The Hatch School (WA). Bamford brings a strategic lens to leadership development, innovation, and change management. He has been a speaker at conferences and his writing has appeared in publications like *Independent School*, *Net Assets*, and *The Yield*.



Carla Silver is the executive director and co-founder of Leadership+Design. She is an experienced independent school educator, school administrator, and designer. Silver partners with schools to enhance the work of leadership teams and boards and designs experiential learning experiences for leaders in schools. She also leads workshops on design thinking, futurist thinking, collaboration and group life, and leadership development. She presents at NAIS Annual Conferences as well as other regional and local conferences. She serves on the board of the Urban School of San Francisco (CA).

## Thursday, March 14, 2024 **DEI & the Board of Trustees: Continuing the Work**

Valaida Wise, Dr. Valaida Wise Consulting

Recent research underscores the vital role a school's board plays in the success or failure of the school's DEI efforts. Since the board's role is so crucial, it is imperative that all members understand the factors leading to success while also understanding the partnership that must exist between the board and school leadership. This webinar will use case studies and research to review the roles and responsibilities of the board while providing a framework model to guide the board's DEI efforts.



Valaida Wise, EdD is president and principal consultant of Dr. Valaida Wise Consulting, LLC which supports schools and organizations in diversity, equity, and inclusion (DEI), governance, and leadership. She is a faculty member in the Graduate School of Education at Johns Hopkins University where she teaches about DEI and issues of social justice. An educator for more than 25 years, Wise has served as head of school in several independent schools, as chair of the board at Creative Minds International Public Charter School (DC) and McLean School (MD), and serves on the board of several professional organizations.

## Thursday, April 25, 2024 **Strategic Small School Governance for a New Era**

Brooke Carroll, Acies Strategies, Consultant & Author

There are many wonderful attributes of small schools that make them attractive to families and students, and small schools face unique challenges that are distinct from their larger school peers. Good governance is particularly important for small schools as they navigate a post-pandemic world. In this webinar, we consider four critical areas that small school trustees must address to support their school's success: business planning, culture, mission clarity and alignment, and partnership with the head of school.



Brooke Carroll, PhD is the principal consultant and coach at Acies Strategies, supporting small schools and nonprofits in leadership development, board development, strategic thinking and planning, and head search. Carroll holds a doctorate in educational psychology and has more than 25 years of experience leading schools and nonprofits. Prior to consulting and coaching, she was head of school for nine years at Seneca Academy (MD). She is the author of *Governing the Small School*, which was published in April 2022.

## Thursday, May 16, 2024 **What's Next Now? Planning for 2024/25**

Tim Fish, National Association of Independent Schools (NAIS)

The pace of change in our schools is constantly accelerating and the forces acting on our ability to thrive are increasing. We are living in an age of adaptive challenges. In this webinar, Fish will explore the five forces that will have the greatest impact on our schools and examine a framework for learning design to help schools ensure that we are preparing students to respond to these forces.



Tim Fish is the chief innovation officer at NAIS and a member of the Strategy Lab team, where he develops partnerships to co-create tools and frameworks that build capacity for designing and implementing innovation. He has roots in the independent school community and a long history at McDonogh School (MD) where he served as associate headmaster. Fish was the founding president and CEO of the FolioCollaborative, a nonprofit community of schools focused on building a flexible faculty/staff development process. He is the co-author of the book *Leadership and Technology at Independent Schools*.

# Bonus Webinars

For current and incoming board chairs only. These sessions will not be recorded.

**Thursday, December 7, 2023**

## Board Chair Roundtable I

Lucinda Lee Katz, Former Head of School & Board Chair  
Irvenia Waters, Former Board Chair & Executive Coach

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



Lucinda Lee Katz 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). 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 served on three private school boards in CA.



Irvenia Waters, MBA is an executive coach, team performance coach, and consultant. She has 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 has been a leader on independent school and nonprofit boards.

**Thursday, May 2, 2024**

## Board Chair Roundtable II

Georgy Ann Peluchiwski & Stephanie Rogen, Greenwich Leadership Partners

Join us for a facilitated conversation on the issues confronting board chairs. Peluchiwski and Rogen invite your participation to share and hear from peers.



Georgy Ann Peluchiwski, partner at Greenwich Leadership Partners (GLP) brings decades of experience spanning financial services, nonprofit board service, and independent school leadership. She serves as faculty for the GLP Women's Leadership Summit with areas of expertise include governance, finance, strategic planning, organizational design, and enterprise risk management. She recently completed 12 years as a trustee at the Latin School of Chicago (IL) including four years as board chair, and four years as treasurer and chair of the finance committee. In addition, she is a director and co-founder of Impact Grants Chicago, an all-women's, volunteer grant making organization.



Stephanie Rogen, principal and founder of GLP is a consultant, coach, and facilitator to educational and nonprofit leadership. Her work integrates more than 25 years' experience in the corporate, educational, and nonprofit sectors. Rogen brings a fresh approach to strategy, leadership development, and transformational change in schools and organizations. An executive coach and facilitator, she works with nonprofits ranging from Columbia University to The White House Project and Northwell Health and is an instructor at the UPenn Graduate School of Education. She has served on the boards of Blair Academy (NJ), St. Luke's School (CT), and the Greenwich United Way.

# REGISTER YOUR SCHOOL TODAY

**ONLY ONE PERSON FROM YOUR SCHOOL NEEDS TO REGISTER FOR THE ENTIRE TRUSTEE SERIES AT ISACS.ORG/TRUSTEESERIES**

### Series Registration Fees

\$600 per school for ISACS member schools for all 10 one-hour webinars.

\$700 per school for non-member schools for all 10 one-hour webinars.

There are no refunds for the Trustee Series.

### Zoom Pre-registration

Prior to each webinar, ISACS will send reminder emails to the school's contact person with details including the Zoom pre-registration link for that webinar.

**Trustees and heads who plan to attend the live presentation must complete a Zoom pre-registration prior to EACH webinar.**

### Recording Access

Webinars will be recorded and made available to registered schools until 6/30/24.

The 12/7/23 & 5/2/24 Board Chair Roundtables will not be recorded.

### Questions?

Contact: [programinfo@isacs.org](mailto:programinfo@isacs.org)