



# THE Trustee's LETTER

*Our 25th Year*

Published by Educational Directions Incorporated • *The Trusted Authority for Advancing School Leadership* • [www.edu-directions.com](http://www.edu-directions.com)

SEPTEMBER/OCTOBER 2013  
VOLUME XXV - NO. 1

## IN THIS ISSUE

### GOVERNANCE

**Intentional Institutional Change**..... 2

#### **Three Elements of Successful Board Work**

*For a more effective board, use these ideas about committees, former board members, and individual meetings*..... 3

#### **When Digital Becomes Detrimental**

*Scholars' concerns about the negative effects of online learning*..... 4

#### **AP Credit No Longer a Sure Thing at College**

*A patchwork is developing, with some colleges giving credit and others stopping*..... 4

#### **Hope and Caring in the Curriculum**

*Efforts to understand and nurture student hopefulness*..... 5

#### **Finding the True Measure of an Organization's Success**

*The challenge in reporting results*..... 5

#### **The "Art" of Transitioning Out of a Capital Campaign**

*Post campaign strategies need careful planning too*..... 6

#### **Evolving Your Development Strategies**

*Keep up with new ways of giving, or risk losing all*..... 7

### CAMPAIGN SPOTLIGHT

**Bright Futures, Big Campaigns**..... 7

### NOTA BENE

#### **Breaking Tradition:**

#### **Strategic Planning in Year One**

*The start of a head's tenure may be the best time for strategic planning*..... 8

## Honoring the Trust in Trusteeship

Conventional wisdom holds that trustees should not micromanage and should stay far away from the operational aspects of a school. The various governance models held up as best practice are theoretical—that is, they are operating under a set of assumptions, which may or may not be accurate in practice. When a school operates smoothly, without crisis, then theory works well. When in crisis or challenging times, perhaps not so.

In fact many governance consultants in the field are taking a fresh look at that assumption of staying at '30,000' feet ("Finding Meaning in Board Work," authors Ryan, Chait and Taylor, *The Trustee's Letter*, May/June 2013). They question how boards can act wisely and responsibly if they do not understand the 'operational realities' of the organization.

So, when is it right to intervene in school matters? Holding the trust of a not-for-profit organization, such as a school, implies that the board has the responsibility to ensure its sustainability, its institutional health, and the fulfillment of its mission. Anything that threatens any or all of these areas warrants the attention of the board.

Often when schools face significant problems, it is right, justified, and even necessary for trustees to play a seemingly far different role than is the norm. Such challenges as significant deficits, litigation, personnel tragedies, and safety issues, for example, evoke the need for those who are ultimately responsible for the school to become actively involved. While some see such an involvement as a form of micromanagement, we believe that it is prudent governance.

While some school leaders are wary of any trustee involvement, others understand that true partnership between head and board means sharing leadership. In fact, establishing this type of relationship as the norm will benefit the school during certain trying times. Board chairs and heads can provide critical (and if need be, operational) information to enable healthy discussions around a range of topics. As schools work towards accomplishing set strategic goals, heads should feel supported in bringing obstacles to those goals (be they resources, timeline, or relevance) to the board for ongoing updates, reviews, and conversation.

In fact, the wisest school leaders understand that the collective wisdom of head and board together often provides efficacious solutions to thorny problems. Considering the vast talent found on most independent school boards, it is difficult to understand why anyone would not want to utilize it for the overall benefit of the school.

The responsible trustee understands his or her role in holding the trust of a school, for this is a trust that is sacred and serious.

CHRIS ARNOLD AND STEPHEN DICICCO, PARTNERS

## Intentional Institutional Change

By ANNE STAVNEY, Ph.D., Head of School, The Blake School, Minneapolis, MN

“How do you decide what to change at a school?” I asked an Upper School parent at a Parent Association meeting this past spring. As I reflected on that brief but profound question I thought about the fact that schools are multi-faceted, complex organizations; at Blake, for example, we have three campuses and divisions, and 14 grade levels. Change in schools is a constant. Some changes are intrinsic and part of the natural development of things while others would not take place without purpose and planning. Seven principles guide my thinking about intentional institutional change.

- 1. A high-functioning school continually evolves so as to remain relevant to its students.** Our students will graduate into a global world that demands different skills for success. Indeed, preparing graduates for the rapidly changing world in which they will live and work is the core and cause of evolving curriculum and programs in schools.
- 2. When we contemplate a change, we are almost always considering a trade-off between competing “goods.”** We are rarely in the clear position of choosing between a wholly ineffectual practice and a highly successful one. Most often, we must assess a proposed program that has many benefits and consider it against an existing program also with many benefits. Good things will come of both, but these different good things must be evaluated against each other.
- 3. We must consider institutional change in context.** What was once an effective approach or strategy might have outlived its usefulness in the current context. A proposed change, then, is not a denunciation of past practice. Rather, it is the next stage in the evolution of a program, curriculum, or activity.
- 4. A great school seeks to instantiate its core values and live out its mission in every dimension of the organization.** Often it is necessary to identify and correct misalignments between core values and ad hoc policies and practices that have become institutionalized over time. Effective school leadership also calls for creating new alignments that stimulate progress toward achieving the school’s strategic goals.
- 5. To manage the process of change effectively, a school’s leaders must garner participation without sinking into paralysis.** Many diverse voices need to be brought to the table to ensure sound thinking and shared investment in the outcome. Sometimes, however, concerns about process can overtake the conversation and impede the larger and shared goal of improving educational outcomes for students.
- 6. Perfection can be the enemy of progress.** We need to study an issue carefully, propose an improvement, study and review that proposal, and then implement it. We cannot expect the first iteration of a program, curriculum, or practice to be perfect. Rather, we should expect to make “good mistakes” — that is, decisions based on sound information and thinking that do not go as expected. I am an avid proponent of pilot programs because they advance us beyond merely discussing improvement.
- 7. When we consider change in school, we must draw ideas, knowledge and perspectives from all relevant sources available to us.** We often look to other schools and learn from them; we look to historical or comparative data for other insights; we survey our alumni, students, families and faculty; we bring in experts; and we join with professional networks to deepen our knowledge. I have learned that no one data set, model, school, expert or report will suffice. Instead, we must look for information and ideas that resonate across our research findings in the context of our school.

In the end, education is fundamentally a hopeful enterprise founded on the belief that humans have the capacity for change. At their most successful, schools alter our students every single day, developing in them new skills, deepening their knowledge, and enlarging their understanding of themselves, each other and the world. 📖

### CALLING ALL BOARD CHAIRS!

Consider having your board chair join the Independent School Chairpersons Association, a membership organization (with more than 120 members) serving as a resource center for leaders of independent school boards of trustees. The Fall conference will be November 8-9, 2013, in New York City.

For more information: [www.iscachairs.org](http://www.iscachairs.org).

# Three Elements of Successful Board Work

*Understanding the nuts and bolts of how successful boards function is a great way to improve your own board's effectiveness.*

**1 Designing Committees for Success:** Committees do much of a board's hard work but care must be taken to make sure the committee is set up to function effectively. A key concern is knowing what committees a board needs, and the answer comes down to the issues for which the board needs "in-depth oversight," e.g. performance, ethical matters, or as a "sounding board for management to draw on the committee's expertise and judgment on matters that don't require formal board action" ("Most Commonly Asked Questions About Board Committees," by Barry S. Bader and Pamela R. Knecht, *Great Boards*, Summer 2013). Other guidelines for effective boards:

- Make sure the committee's charter describes "overall purpose, authority, specific responsibilities...term limits (if any) and required/desired competencies." Review the charter annually.
- Size of the committee should be small enough to allow efficient and targeted work; five to seven members is a suitable size for most committees.
- Allowing non-board members to serve on a committee is a good practice for "adding expertise not present on the board [and] engaging potential future board members," among other reasons.
- Committees should assist the board by making recommendations but generally should not be decision makers unless it is specifically mandated by the board that the committee should have that power.

**2 Staying Connected to Former Board Members:** As board members reach a point where they leave the board, it is worthwhile to stay in touch with them so as to benefit from their perspective ("Don't Bid Your Best Friends Farewell," by Jeff Jowdy, *fundraisingsuccessmag.com*, June 19, 2013). Tips for staying connected:

- Ask them for guidance on a specific program or invite them to be a member of an advisory board.

- Propose board committee work or annual fund volunteering.
- Hold an annual former board member meeting or briefing.
- Collaborate with them to write articles about the organization.
- Extend an emeritus title to show appreciation for past service.

**3 Making Time to Meet Individually:** An organization's leader and board chair should make a point of holding an annual meeting with each individual board member in order to ensure top performance ("Meeting Yearly with Individual Board Members Bears Fruit," by Kay Sprinkel Grace, *guidestar.org*, May 2013). "Even if [the board and its members are functioning well], a yearly meeting with each board member will both improve motivation and often increase their financial contributions." The positive results of these annual meetings include:

- Getting input from a board member on issues that might not arise in the group
- Exploring how to optimize the board member's involvement in coming months
- Reinforcing the appreciation the organization has for the board member
- Discussing the board member's financial gift to the organization, while providing a model the board member can use when asking other people for gifts
- Determining whether the board member may have reached a point when he/she needs to leave the board. "Possibly the most challenging decision board members ever make is determining when and how to de-enlist one of their colleagues...If your board chair and CEO are willing to meet annually with each board member, the angst over de-enlistment will dissipate. This is the best opportunity, in private, to ask why the person's involvement has declined." 📌

The Trustee's Letter was founded in 1989 to serve the needs of Independent School Boards and is published bi-monthly during the academic year. Articles, letters to the editor, comments, and suggestions are welcomed.

Send to: The Trustee's Letter, Educational Directions Incorporated, PO Box 768, Portsmouth, RI 02871.

TEL: 800.647.2794, 401.683.3523 • FAX: 401.683.6120 • E-MAIL: [hdiccico@edu-directions.com](mailto:hdiccico@edu-directions.com)

EDITORS: Harriet K. DiCicco, Jill Connors • Copyright, Educational Directions Incorporated, 2013

# When Digital Becomes Detrimental

**T**echnological innovation has led to the online, connected, digital world of today with many positive effects in terms of access to a global community and a wealth of information. The negative side of digital life, however, is a topic of concern among scholars, particularly in terms of online learning (“Scholars Sound the Alert from the ‘Dark Side’ of Tech Innovation,” by Marc Parry, *chronicle.com*, May 8, 2013).

“Education...is about teaching people how to think, how to question, how to sit in a room with someone and express a different opinion. Equating it with simple content delivery ‘denudes’ what it means to teach and learn,” writes Parry, in describing what new media scholar and English professor Richard Grusin felt was a negative effect of massive open online courses (MOOCs).

Grusin organized a conference called “The Dark Side of the Digital,” which was held at the University of Wisconsin at Milwaukee in May. MOOCs may lead to a situation where fewer university professors actually teach

in-person classes; instead, teaching assistants may end up simply acting as moderators to online discussions, and that’s a much less vibrant and dynamic way to learn.

The digital age also poses a risk to a person’s capacity to broaden their learning and thinking because it limits the variation in the sources offered to a person. “Increasingly, networked technologies track everything about us, creating records of where we go, what we buy, what we read, what we like, and who our friends are,” said Julie E. Cohen, professor at Georgetown University Law Center, who was also a speaker at the conference.

“[T]ake the process of reading and seeking information. The terms in which you participate in political discussions are shaped by the fact that when you look for information online, what is shown to you is already manipulated to conform with what is likely to interest you.” An individual’s loss of control over what information is offered to them is of deep concern to Cohen, especially given that people won’t ever know what they’re missing. 🔔

## AP Credit No Longer a Sure Thing at College

### **A PATCHWORK APPROACH IS DEVELOPING IN TERMS OF COLLEGES AWARDING CREDIT**

for high school AP classes: Some colleges do, some colleges don’t, some colleges even have different rules according to each academic department (“Colleges Reassess Value of AP Classes,” by Kate Wilcox, *Tribune-Review*, June 8, 2013). For high-achieving high school students, the impetus to continue taking AP classes may still be strong based solely on the notion that they are better prepared for college and also more competitive candidates for admissions.

Beginning in fall 2014, Dartmouth College will no longer give credit toward graduation for AP classes; Brown University has already stopped, and certain departments at Columbia University have also stopped. “In making the move, Dartmouth officials stressed that it was more about ensuring the rigors of a Dartmouth education than a lack of confidence in the Advanced Placement program, which is administered by the College Board, the same nonprofit group that runs the SATs.”

At Carnegie Mellon University’s School of Computer Science, students can still receive credit although they must earn a higher score on the AP exam: a 4 or a 5, versus the previously acceptable 3 or 4.

Yet at other leading public research institutions, such as the University of Pittsburgh and Pennsylvania State University, there is no change to the AP credit approval, and required scores still vary from program to program.

Meanwhile, the College Board reports that the number of students taking AP exams keeps going up. “[I]n 2012, 32 percent of all high school graduates—954,070—took at least one AP exam. In 2002, 18 percent of students—471,404—took at least one test.”



### **Expertise Tailored to Your Needs**

Contact us – we’d love to provide you with information about our services:

**Executive Searches • Board Retreats & Workshops • Strategic Planning**

Educational Directions Incorporated, 800-647-2794, ext. 2.

See our client list at [www.edu-directions.com](http://www.edu-directions.com)

# Hope and Caring in the Curriculum

**A** new national survey for students plus professional development workshops for K-12 educators are part of an effort currently underway to understand and nurture student hopefulness—an acknowledgement of the importance of emotional well-being to a student’s academic performance.

Students in Montgomery County (Maryland) public schools, for example, will participate this fall in the Gallup Student Poll, which will survey students in 2,000 schools across the country (“Montgomery County Measuring ‘Hope’ to Help Improve Academic Success in Schools,” by Lynh Bui, *Washington Post*, July 17, 2013). The poll includes questions about whether students “energetically pursue goals,” laughed or smiled a lot yesterday, “have a best friend at school,” and believe “there is an adult in my life who cares about my future”—all designed to measure student hope.

Beyond standardized test scores, there is growing awareness of how important it is to measure emotional aspects. “[Educators] contend that there is a direct line between emotional well-being and long-term academic and career success.” Hope in an academic sense means a student can set goals—and achieve them.

Recent research backs up the concept: In a 2011 study, students from a school emphasizing emotional well-being scored an average 11 percentage points higher on standardized tests. There’s a boost for teachers as well, who value being able to work in a positive environment.

To help educators explore social-emotional learning, innovative workshops are being developed such as UC Berkeley’s Greater Good Science Center’s six-day program, which debuted this summer with a focus on self-awareness, understanding emotional cues, and “the theory and practice of self-compassion, gratitude and empathy” (“Schooling Teachers on Social-Emotional Learning,” *greatergood.berkeley.edu*, July 9, 2013).

In several states (Illinois, Michigan, Florida, Alaska), social-emotional learning programs are already being mandated for integration in the curriculum, and a bill has been introduced to support social-emotional learning in schools nationwide. It seems science is catching up with what the best educators and schools have known intuitively for years. “Scientific research is starting to show that there is a very strong relationship between social-emotional learning and cognitive development and performance,” noted Greater Good’s education director. 📌

---

## Finding the True Measure of an Organization’s Success

**T**here are much more important goals for an enterprise than making money, but when it comes to measuring success, money does have its advantages: Revenue is either up or down. There is no similarly easy tool for assessing organizations, however; indeed, when an organization shows too much money on the bottom line, it may raise concerns that it isn’t focused on its mission.

Three types of data help measure an organization’s success, but only one appears on financial reporting, and unfortunately it’s not the one that best portrays mission success (“Using Outcomes to Measure Nonprofit Success,” by Richard Larkin, *nonprofitquarterly.org*, July 2, 2013).

- **Inputs:** These measures describe the resources, whether human or financial, that are required for the organization to be in business. These resources can be easily quantified and hence inputs appear on financial reports.
- **Outputs:** These measures indicate what the organization is producing, whether it is enrollment, classes, special programs, or other events. “The problem with this type of data is that, while it shows the quantity of

program services provided, it does not indicate whether any real benefits resulted. Did the students learn anything?”

- **Outcomes:** These measures attempt to gauge whether the organization’s target audience has benefited from what the organization does. If an organization is attempting to educate a community about substance abuse, for example, does the data show a decline in rates of abuse?

The challenge in showing whether an organization is successful lies in the fact that only one of these measures, namely inputs, ever appears in financial reports, and that is the one measure that says nothing at all about the results the organization is dedicated to achieving.

“[S]ome organizations present certain output data in footnotes, as supplementary schedules or in management reports. However, true success is measured only by outcomes, and these data are never found in financial statements, if they can be obtained at all.” 📌

# The “Art” of Transitioning Out of a Capital Campaign

By **WOODIE HASKINS**, Assistant Head for External Affairs  
Buckingham Browne & Nichols, Cambridge, MA

It’s possible that the planning for your current campaign began nearly a decade ago...is that conceivable? Current data suggests that comprehensive campaigns are taking much longer to complete due to increased initial planning and extended nucleus phases and public phases. This means that your institution has been engaged in this effort for a significant amount of time.

During this time, you have sustained the interest of your various constituencies and kept them informed of exciting accomplishments along the way. Fortunately, you’re nearing the end of the campaign and will have great news to announce shortly. Before you enter the final phase of this endeavor, there is some serious planning that should be addressed concerning the institution’s post campaign strategies.

Despite the fact that volunteers, staff, and donors will undoubtedly be fatigued following the conclusion of the campaign, it is critical that your institution develop a strategic plan to address its needs moving out of the formal campaign mode. The natural temptation is to step back and “rest” a bit—certainly everyone involved deserves some less stressful moments. Yet, the years following a campaign don’t have to be (and shouldn’t be) viewed with low expectations. It’s absolutely crucial how this “mindset” is communicated to your school community. Here’s why!

During this lengthy period of the campaign, you have met some or most of the initial goals that were set forth in the planning phase. However, not every major need of the campaign may have been fully funded, and over this extended timeframe, it’s entirely possible that your institutional priorities may have indeed shifted.

It is also true that some donors did not participate in the last campaign, for understandable reasons, and that potential donors who were new to your school community did not have the opportunity to participate in the final stages

of your effort. It’s tempting for these two groups and others who may be capable and willing to make another gift to the school to think that all the needs have been successfully met. So it’s absolutely critical that an appropriate energy level is sustained and that current institutional needs are clearly articulated as you are transitioning out of the formal campaign timeframe.

A few suggestions on how you can avoid a perceived “let-down” coming out of the campaign:

“**It’s absolutely critical that an appropriate energy level is sustained and that current institutional needs are clearly articulated as you are transitioning out of the formal campaign timeframe.**”

- During the final year of the campaign, the board and senior institutional leaders should formally adopt short-term priorities based on unmet campaign needs and new emerging institutional needs.
- Decide whether these new priorities will be funded as a series of “mini campaigns” or through other fundraising strategies.
- Re-focus your efforts on increased levels of support for your annual fund—current use funds are becoming more crucial to the financial health of most institutions.
- Don’t overlook the importance of your stewardship program. The emphasis of this program is every bit as critical after the conclusion of a campaign.
- Develop a thoughtful communications plan that will be implemented immediately following the conclusion of the campaign. Aggressively market the emerging needs and new institutional initiatives to your school community and celebrate the resulting major gifts responding to support these initiatives. Keep the momentum going!

So much time and effort went into your campaign—and the successes most likely include meeting your fundraising goals, affirming your institution’s mission, upgrading your donor base, broadening your volunteer base, refining your major gift program, improving your information/records systems, and enhancing community pride. Proper planning for the next phases of your institution’s future will help you build even further on your recent successes. Move forward with confidence! 📬

# Evolving Your Development Strategies

**I**t's no surprise that development offices put a high priority on nurturing ongoing relationships with valued donors, but too much reliance on the methods that have always worked in the past can put an organization at risk in today's world, where changes seem to be nothing short of seismic. "Maintaining the status quo with your development strategies can cause significant challenges when a shift occurs in your funding," advises a partner at Alexander Haas, Atlanta-based development consultants ("Maintaining Your Development Plan: There's No Time Like the Present," by Jerry Henry, *fundraisingcounsel.com*, June 28, 2013).

Two examples that serve as prompts for action:

- **Eggs in one basket:** "An organization that has depended for years on one major donor to carry the philanthropic load for the annual operating budget, or for achieving a campaign goal, learns that the donor is cutting back their annual gift in favor of another organization."
- **Aging donors:** "An organization that was comfortable with a large group of major donors realizes that those major donors are almost entirely over 70 years old."

In addition, too much reliance on the annual fund may be cause for concern as experts are seeing shifts in that historically stalwart tool for fundraising ("Annual Funds Face Challenges in an Age of Involved Donors," by Don Troop, *Chronicle of Higher Education*, July 29, 2013).

"Annual funds...have become a tough sell in an age when philanthropy has been divided into such micro units that a donor can give a table to a specific fourth-grade class."

To adapt, experts suggest making it easy to target donations, whether to financial aid, internships, athletics, or other favorite programs—and thereby get young alumni to start their own history of philanthropy. "They can give \$25 or \$25,000...either size of gift brings them into the fold and makes them part of the college's larger community."

## Editor's Note: By the Numbers

A new study by Blackbaud, a provider of fundraising software and services for organizations, examines generational shifts in giving (*blackbaud.com/nextgen*). The study, "The Next Generation of American Giving: The Charitable Habits of Generations Y, X, Baby Boomers, and Matures," provides keen insights, including:

- Baby boomers make up 34 percent of donors and 43 percent of all money.
- Young donors are less likely to make unrestricted gifts; only 22 percent of millennials will make a gift that isn't tied to a specific purpose, versus 43 percent of donors born before 1946.
- Millennials would rather give time than cash; 48 percent of donors born before 1946 recognized cash as the most important gift versus 25 percent of millennials. 📌

## CAMPAIGN SPOTLIGHT

### Bright Futures, Big Campaigns

**Dining Together:** With a goal of \$7.5 million for campus construction, **Rumsey Hall School**, in Washington, CT (Coed, Boarding/Day, 333 students, grades K-9) is nearing the target. Some \$5.9 million has already been raised. The main focus is a new dining hall allowing the school to resume evening meal together; the design also includes a movable wall that will allow for a private dining area for use by teams, dorms, and student organizations.

**Limitless Futures:** This \$8 million campaign for **Chapin School**, in Princeton, NJ (Coed, Day, 310 students, PK-8) began in March 2013 and is well underway, focusing on three areas: Lower and Upper School facilities, faculty salaries and professional development, and financial aid support. In June 2013, renovation of the Upper School began, and an addition for the Lower School and Upper School are in the plans; all construction will be done to LEED silver standards for energy and environmental design.

**McDonogh Forever:** The final phase of this \$75 million campaign for **McDonogh School**, in Owings Mills, MD (Coed, Day/Boarding, 1,298 students, grades K-12) is in progress; the campaign has reached the \$72 million mark. The funds will go toward new academic spaces—math classrooms, science laboratories, fine and performing arts studios—and a new gathering space. McDonogh Forever is the school's seventh capital campaign since 1972; more than \$92 million was raised in the six prior campaigns.

**Bicentennial Celebration:** To honor its 200th anniversary in 2014, **The Linsly School**, in Wheeling, WV (Coed, Day/Boarding, 450 students, grades 5-12) has launched a \$10 million campaign. Called "Forward and No Retreat," the campaign will support three priorities: building the school's endowment; investments in academic excellence; and creating spaces to grow and learn. It is the largest fundraising campaign in the school's history.

# Breaking Tradition: Strategic Planning in Year One

By SYLVIA RODRÍGUEZ VARGAS, Ph.D., Head of School  
Brownell-Talbot School, Omaha, NE

*Conventional wisdom may hold that a new head needs a honeymoon during the first year, but here's the viewpoint from a head who thinks strategic planning early on may be the best way to proceed.*

Some caution first-year heads to defer strategic planning until after year one to allow time to feel connected to the community, learn about the culture and needs of the school, and have the appropriate support in initiating such an important process. I certainly agree that there are advantages to spending a year or more building relationships and trust, learning about key areas of the school, and being more fully informed about the best course of action to accomplish a strategic plan. However, a head's first year also presents particular opportunities that are assets to the strategic planning process.

Being new affords fresh perspective without preconceived notions of what the plan should include. A new head can ask many questions and act as a researcher, gathering data and acquiring knowledge. This is a great way to build partnerships and teams while also learning quickly and deeply about the school and its culture. Engaging the community as co-authors of the vision forward and enlisting members of various constituent groups to collaborate on such a purposeful exercise can also create great agency, which in turn can validate and celebrate the voices of those who are deeply committed to the school's mission. This process can also garner tremendous support in year one with key stakeholders who have had a chance to connect with the new head personally, feel they have a better idea of the leadership and philosophy of their new leader, and are gratified to be consulted and included in creating a new vision.

It has been my experience as a first-year head of school that having a professional consultant assume the role of facilitator was most appropriate. I had the opportunity to frame the work and process with the board chair several months prior to the official July start date by researching several consulting firms. We interviewed five prospective

groups before a decision was made, and we then developed a timeline to outline the work. The school would host the visiting accreditation team that fall as well and had already completed a tremendous amount of work during the self-study for reaccreditation. There was a good amount of data available, having completed constituent surveys and a thorough assessment of all school operations and departments for the self-study. This provided an informative body of work for me to review in becoming better familiar with the school culture and needs. It also presented a strong backdrop for the strategic planning consultants.

On-site focus group discussions with students, faculty, staff, parents, alumni, administrators, and board members followed the review of data in the fall. In January, a two-day retreat took place with the consultants and a team of about 35 people across constituencies. Following the retreats, several writing teams began to articulate the main areas of strategic need identified during the group work at the retreat, and after several iterations, three primary vision statements emerged. Further collaboration in the writing process helped to identify strategic

objectives and metrics for each vision statement, and with board input throughout the writing, a final document was approved during the board's spring meeting.

Engaging in strategic planning and leading this work in one's first year of headship can prove to be a valuable exercise. Collaborating to shape the next chapter in the life of the school can be greatly rewarding and a significant benefit, under the right conditions, with the appropriate approach and framework, and with the support of the board and school community. A strong vision that is articulated clearly and effectively can be a catalyst for healthy growth and meaningful change. 📌

*“A new head can ask many questions and act as a researcher... Engaging the community as co-authors of the vision forward... can validate and celebrate the voices of those who are deeply committed to the school's mission.”*