



Trustee/School Head Conference

Saturday, January 23

8:00 A.M. - 9:00 A.M.

REGISTRATION
Terrace Room

CONTINENTAL BREAKFAST
Grand Ballroom

9:00 A.M. - 10:30 A.M.

GENERAL SESSION
Grand Ballroom

WELCOME AND ANNOUNCEMENTS
James McManus
Executive Director, California Association of Independent Schools

INTRODUCTION
Nanci Z. Kauffman
Head of School, Castilleja School

KEYNOTE ADDRESS
Martin W. Shell
Vice President for Development, Stanford University
"The Joy of Fundraising: What Your Mother Never Told You!"

10:45 A.M. - 12:00 P.M.

WORKSHOP SESSION ONE

12:15 P.M. - 1:15 P.M.

LUNCH
Grand Ballroom

1:30 P.M. - 3:00 P.M.

WORKSHOP SESSION TWO

3:15 P.M. - 4:30 P.M.

WORKSHOP SESSION THREE

4:30 P.M. - 6:00 P.M.

RECEPTION
Crown Room

Sunday, January 24

8:30 A.M. - 10:00 A.M.

BREAKFAST
Grand Ballroom

9:30 A.M. - 11:15 A.M.

GENERAL SESSION
Grand Ballroom

INTRODUCTION
Mark A. Brooks
*Board President, California Association of Independent Schools,
and Head of School, Pilgrim School*

KEYNOTE ADDRESS
Jane Buckingham
Founder and CEO, Trendera
"Managing and Marketing to Generations X, Y and V: How
Understanding the Next Generations Will Help You Better Reach Them"

Session One

10:45 A.M. - 12:00 P.M.

TRUSTEESHIP 101

Al Adams, Organizational Advisor, AlAdams.org

Fountain Room

This workshop is designed for those — especially new trustees — interested in exploring how the roles of trustees and Heads relate in today's dynamic independent school world. Special focus will be on the “gray areas” between the Board setting — and the Head implementing — major policy. The broader context will be the best use of trustees' time and talent in positioning their school for success — in terms of institutional identity, market appetite, distinctive/differentiating features of their school, and financial sustainability.

FROM RETIREMENT ANNOUNCEMENT TO NEW HEAD WELCOME COMMITTEE: GETTING IT RIGHT!!

Bob Fricker, Search Consultant, Carney Sandoe & Associates, Kathleen McNamara, Head of School, Sameer Hilal, Board Chair, Mackenzie Leshner, Trustee and Search Committee Co-Chair, Matthew Janopaul, Trustee and Search Committee Co-Chair, and Bill Miller, Former Head of School, The Seven Hills School

California Room

The Seven Hills School community successfully navigated the waters of school change with a thoughtful, deliberate process and lots of input from stakeholders. This session will include remarks from the retired Head, the Board Chair, the new Head, the Search Committee Co-Chairs, and the search consultant about what is possible when a systematic, coordinated approach is used in recruiting a new Head of School.

PRIORITIZING IMPROVEMENTS AND DEVELOPING SCHOOL STRENGTHS THROUGH RESEARCH

Jonathan Honiball, Director of Research, and Lauren Kolodziej, Research Analyst, Pacific Consulting Group

Terrace Room

How does a school incorporate parent, student, and faculty feedback to improve programs, retention, and reputation? Given the limited resources of time and money, choosing where to invest is critical, as it can affect programs and relationships with parents and students. Sorting among different informal discussions, anecdotes, and perceptions can be challenging. Market research techniques that identify what matters most and that provide actionable insights can help schools to focus improvement conversations and invest limited resources for the greatest impact on experience and reputation. This session will explore how this research approach effectively supports school improvement and innovation.

LEVERAGING THE PAST: RECOGNIZING HISTORICAL NARRATIVES AS CRITICAL INFLECTION POINTS FOR TOMORROW'S WISE DECISIONS

Debbie Freed, Organization and Leadership Consultant, Debbie Freed & Associates, Lucinda Lee Katz, Head of School, Marin Country Day School, and Mark McKee, Head of School, Viewpoint School

Vanderbilt Room

Embedded in every organization is a founding institutional narrative, with its underlying consistencies and contradictions. Heads and trustees must make sense of these threads, with insights that inform key decision points in the life of the institution. In schools, these pivotal moments include leadership transitions, strategic planning efforts, crises, change and innovation initiatives, and the unexpected. In this session, participants will explore the “systems lens model” to support leaders in connecting the dots to preserve what really matters while engaging in institutional transformation. Learn how two experienced Heads have used a graphic mapping exercise as a visual catalyst and touchstone for managing transitions, incorporating new initiatives, deepening school culture, and strengthening Board and administrative teams in their leadership. Participants will learn how history-culture mapping serves as a problem-solving and planning tool, which can be invaluable for small and large groups to make sense of the past and present, as leaders guide and ensure a clear vision for their unique school cultures.

FRESH AND INNOVATIVE APPROACHES TO HEAD EVALUATION

Scott Erickson, Head of School, Phillips Brooks School, Sam Cuddeback, Head of School, Drew School, and Julie Elam, Head of School, Marin Primary & Middle School

Gold Room

Head evaluation often begins with this question: How do we judge our Head of School? This session turns on its head the assumption that Head evaluation is primarily about judgment by proposing some fresh thinking with a different question: How can trustees and Board Chairs effectively help their Head become a better Head? This session will address this question through the lens of the Head of School. By offering insight into what Heads can and should find helpful in an evaluation, the presentation will reframe evaluation as an ongoing tool to help Heads be better leaders. This session will also address how, when done right, Head evaluation builds trust, avoids second-guessing, improves Board Chair-Head dynamics, moves the institution forward, and deepens the Head's investment in the school's mission. Led by Heads of School, who have five, ten, and twenty-five years of head experience, this session will be relevant to a wide range of schools. Successful strategies that will be presented include: building the Board Chair-Head partnership, developing Head goals, using anonymous surveys and executive sessions effectively, delivering and receiving ongoing feedback, conducting 360 reviews, building trust, and more. There is no single perfect evaluation model. However, through fresh and innovative approaches, Head evaluation need no longer be a once-per-year experience to be feared, but rather an ongoing process for growth and success.

KEYNOTE SPEAKER PRESENTATION — FOLLOW-UP SESSION

Martin W. Shell, Vice President for Development, Stanford University

Grand Ballroom Lounge

GENERATING ADDITIONAL REVENUE STREAMS THROUGH A SIGNATURE PROGRAM

Peter McCormack, Head of School, Heidi Morris, Director of Middle School, and Bill Johnson, Board Treasurer, Rolling Hills Preparatory School

Venetian Room

In 2004, Rolling Hills Preparatory School acquired a permanent site for its campus and decided to found a “school within a school” as a catalyst for enrollment growth in its new and expanded space. The Board chose to focus on a signature program, — bright students with dyslexia, ADHD, and other language-based learning differences — and “Renaissance School” was born with just 10 middle-schoolers. Eleven years later, Renaissance enrolls over 70 students, and brings substantial net income to the school. To what extent might this successful model be transferable to signature programs with a different focus such as art, music, or STEAM? This session will offer an overview of what the trustees and administration learned as they founded, launched, and nurtured Renaissance to near full capacity.

PROPOSED CAIS STRATEGIC PLAN — FEEDBACK SESSION FOR HEADS

James McManus, Executive Director, California Association of Independent Schools

Crystal Room

At last year’s Trustee/School Head Conference, the CAIS Executive Director shared information with attendees regarding the strategic landscape for California’s independent schools. The CAIS Board of Directors has worked purposefully since that time to identify and develop the most important priorities for the Association as it looks to the next five years, and those priorities are now embedded in the new draft strategic plan for CAIS. The Board has taken a bold approach to facing — and embracing — the future, and it wants to share its emergent thinking with the membership before formally adopting the plan. This session will provide Heads of School with the opportunity to hear about the draft plan and to offer feedback and suggestions regarding its focus, tone, and contents. A similar session will be held on February 1 in the Los Angeles area for Heads who will be unable to attend this session. The CAIS Board will review all of the comments from these two sessions when it meets on February 3, as it continues the editing process and moves toward finalizing this blueprint for the Association’s future.

USING THE NEW CAIS ACCREDITATION PROCESS TO LAUNCH STRATEGIC PLANNING AT YOUR SCHOOL

Joe Harvey, Head of School, Kristin Keeffe, Trustee, Wendy Broderick, Director of Admissions, Co-Chair of Accreditation Committee, and Dave Hickman, Upper School Head and Accreditation Committee Co-Chair, Mark Day School

Pavilion Room

The new CAIS accreditation process offers schools a great opportunity to reflect not just on their areas for growth, but also on the strengths that can be lost without intentional stewardship. The focus of accreditation has also shifted from mere reporting to a much deeper and more reflective analysis of how a school assesses itself, including the use of data, and how it engages in implementing effective change. Further, the new accreditation model has been designed to fit with a school’s strategic planning process. In this session, a Strategic Planning Committee Chair (trustee), a Head of School, and the Accreditation Committee Co-Chairs (senior administrators) will share insights about how they organized the school and approached the self-study process and how they used that process to lead directly into strategic planning.

IN SEARCH OF ... YOUR NEXT HEAD OF SCHOOL

Cathy Hunter, Head of School, and Shannon Cogen, Board Chair, San Francisco Friends School, Christine Nooney, Search Chair, Cathedral School for Boys, Kathleen Patterson, Trustee, The Bay School, and Cathy Schember, Search Chair and Board Chair, San Francisco University High School and The Hamlin School

French Room

WANTED: HEAD OF SCHOOL. California independent school seeks dynamic, personable, credentialed School Head to lead the school in its mission, pedagogy, strategic planning, and fundraising, with special attention to the school’s finances, cultural and spiritual dimensions, the professional growth and job satisfaction of staff, neighborhood relations, and the academic and social emotional growth of children. Must love kids, multi-million dollar capital campaigns, and complicated carpool logistics. Serious applicants only. As an unprecedented percentage of School Heads are facing retirement age, more and more Boards will be looking to fill seemingly unfillable shoes. Learn about the joys and possible pitfalls of this mission-critical process from a panel of veteran head-search trustees from Bay Area independent schools. Topics will include: timelines, communications, search committees, search consultants, internal candidates, interim headships, the interview process, and contract negotiations.

IMPORTANT CONSIDERATIONS WHEN LEASING YOUR SCHOOL BUILDING OR FACILITIES

Heather DeBlanc, Partner, Liebert Cassidy Whitmore

Hunt Room

Leasing out school buildings and facilities provides obvious benefits and hidden dangers. When a school leases a building or facility— such as a field, gymnasium, or auditorium — to a third party, it is important to protect the school and minimize liability. This presentation will discuss the pros and cons of leasing out school facilities, the steps involved, how to avoid issues, typical lease provisions — and which ones are critical to protect a school. This session will also provide an overview of activities that might subject a 501 tax-exempt organization to the unrelated business income tax (UBIT), and will offer attendees a checklist of issues to address when leasing a facility to a third party.

Session Two

1:30 P.M. - 3:00 P.M.

FEATURED SPEAKER PRESENTATION — THE INDEPENDENT SCHOOL DONOR'S PERSPECTIVE: UNDERSTANDING WHAT WORKS AND WHY

Rick Happy, Principal and Managing Director, CCS

Gold Room

The importance of major gifts to successful fundraising has never been more critical than it is today. Major gifts often present the area of greatest potential for the annual fund, capital and endowment campaigns, or other extraordinary needs. This special session will help to develop an understanding of major donor motivations and ways in which trustees and other members of development teams can bring major donors closer to a school and inspire meaningful support. Learn what works, what doesn't, and why securing major gifts and building long-lasting mutually beneficial relationships between a school and its donors are the cornerstones of fundraising success. An open discussion period following initial remarks and the presentation will provide participants with the opportunity to ask important questions.

ANNUAL LEGAL UPDATE

Michael C. Blacher, Partner, and Donna Williamson, Partner, Liebert Cassidy Whitmore

Grand Ballroom Lounge

It has been a busy year in the courts and in the legislature! This presentation will review and analyze recent cases and new statutes from across the country that are of greatest significance to trustees and Heads of School. It will address some well-publicized and frequent areas of concern, while also delving into critical issues that may be overlooked or misconstrued. The presentation is designed to leave trustees and Heads of School with a proactive agenda, as well as to provide an opportunity to hear from each other how schools are addressing issues of state-wide, if not national, concern. Be prepared for a wide-ranging, interactive experience!

GREEN DREAMS: HOW TO ACHIEVE CARBON NEUTRALITY — AND SAVE MONEY IN THE PROCESS

Paul Chapman, Executive Director, Inverness Associates, and Trustee, Prospect Sierra School, Katherine Dinh, Head of School, and Steve Harrington, Facilities Director, Prospect Sierra School, and Raphael Rosen, President, The Carbon Lighthouse

California Room

At a time when so many independent schools are looking for ways to reduce their carbon footprint and increase financial sustainability, it can be revolutionary to discover how becoming a green school can also improve the bottom line. Learn how a combination of efficiencies, onsite energy production, and carbon allowances can potentially add up to carbon neutrality, without increasing your budget. This workshop will provide a step-by-step approach on how to move forward, with information regarding energy audits, cost-saving efficiencies, onsite energy production options, advantages and disadvantages of carbon allowances and offsets, and strategies for working with Buildings and Grounds Committees, Finance Committees, and Boards. In this session, participants will learn how one school, recognized nationally as a Green Ribbon School, illustrates how the deeper greening of our schools can support financial sustainability.

CRISIS 101 — HOPE IS NOT A STRATEGY

Jim and Jane Hulbert, Founders, The Jane Group, and Lauren Lamm, Trustee, The Branson School

Vanderbilt Room

When a crisis affects a school, the more prepared the school is in advance, the better the school will fare as it moves through the crisis. Participants in this workshop will learn what preparations a school should make in advance, the first 10 steps in the first 60 minutes, and the key "pain points" the school must address. This session will also share best practices, strategies, and examples of effective communications. The crisis will eventually go away. HOW it goes away is key. Maintaining a strong moral and ethical compass will allow a school to emerge as a stonger institution.

REFLECTIONS FROM THE FIELD — HOW SCHOOL HEADS & TRUSTEES CAN POSITION THEIR CAMPAIGNS FOR SUCCESS

Josh Stern, Head of School, Debra Farb, Former Trustee, and Karan Merry, Former Head of School, St. Paul's Episcopal School, and Patricia Stirling, Founding Partner, Cardaronella Stirling Associates

Venetian Room

According to NAIS, in the next five years, two-thirds of the independent school heads nationwide are likely to retire, creating new opportunities and challenges as a new generation of education professionals takes the helm. Whether a Head is newly minted or an experienced pro, the pressure to conduct ever-larger campaigns, with less time between campaigns, is the new reality. As independent schools continue to strive for excellence, campaigns continue to grow larger and the amount of time between campaigns continues to shrink, providing new stresses for Heads and trustees alike. For the new Head of School or seasoned Head charged with conducting a major campaign initiative for the first time, the effort can be daunting. In this presentation, a new Head of School joins three longtime independent school professionals, who will share their insights and experiences from working together on numerous campaigns and will provide a roadmap for successfully reaching campaign goals. Topics to be covered include the following: setting the stage — the importance of planning; (strategic planning, development audits, feasibility and market studies, and resource allocation); "building the airplane while flying it" — overcoming the challenge of preparing and cultivating key stakeholders during the early phase of the campaign, while simultaneously building the necessary infrastructure to conduct the campaign; what's new — utilizing new fundraising tools, channels, and metrics; conventional wisdom — is it always the best way; and finding balance — how to maintain and build momentum while maintaining sanity.

TRUSTEES AND HEADS WORKING FOR DIVERSITY, INCLUSION, AND EQUITY

Alison Park, Consultant, Blink Consulting, Alex Wong, Trustee, Town School for Boys, and Barre Fong, Trustee, Lick-Wilmerding High School

Terrace Room

Understanding, cultivating and leveraging diversity and cultural competency in schools is a governance responsibility, as much as it is a community and individual responsibility. This working conversation is part of an innovative pilot grass-roots program bringing trustees and Heads together as a professional learning community to enhance governance efforts and resources to effect diversity, inclusion, and equity for 21st century students. Participants will learn about a Bay Area model and program, and they will take part in a generative discussion about what it means to be diversity, inclusion, and equity leaders in schools. This session will also identify vital areas of responsibility for Heads and Boards, discuss cultural competency needs within any Board (because it's not just good for the kids), and explore effective practices in this arena for school leadership.

THE BOARD'S PROPER ROLE IN ENROLLMENT MANAGEMENT: LEVERAGING CORPORATE EXPERIENCE

Mark McKee, Head of School, Laurel Baker Tew, Chief Enrollment Officer, and Charles Schetter, Trustee Chair of Strategic Planning, Viewpoint School

Fountain Room

Enrollment sustainability in today's threatened independent school environment requires development and implementation of purposeful, highly prioritized, and impactful competitive positioning strategies that are similar to those in the business world. But educational institutions answer to impassioned stakeholders, not corporate stockholders: schools must operate like well-run businesses, while also balancing pressures that can distract them from achieving their mission. This session will explore how CEOs (Heads) can best leverage and meld the talents and expertise of governance (trustees) and practitioners (Admission Directors) in order to protect and grow their institutions.

HOW A STRONG BRAND CAN IGNITE YOUR ADMISSIONS CAMPAIGN

Travis Brownley, Head of School, Marin Academy, and Jennie Winton, Partner, Co-Founder, Mission Minded

Crystal Room

When it comes to an independent school, what does branding really mean? This interactive session will highlight how having a carefully constructed brand will ignite passion inside your institution to have people become powerful ambassadors for your independent school. This session will share how a school developed the cohesive brand that rallied its school community and how that brand helped to focus the redesign of its admissions campaign. A solid, thoughtful brand strategy is the key driver behind the successful development of an admissions campaign that is genuine and that sets a school apart, recognizing that an irresistible admissions campaign is so much more than just a view book. Attendees will leave this session with a clear sense of how a stronger brand and targeted, compelling messages will help their school attract more "right-fit" families.

HEAD OF SCHOOL EMPLOYMENT CONTRACTS: UNDERSTAND WHAT THINGS MEAN

Terrence Briggs, Lawyer, Bowditch & Dewey, LLP

Hunt Room

Designed for Heads, aspiring Heads, and trustees, this workshop will work through the most important provisions in a standard HOS employment agreement — including, but not limited to, compensation and benefits, performance evaluation, and the process for and benefits payable upon early termination — using language and terms from actual contracts. This session will explore data-gathering and negotiating strategies, the importance of advanced preparation, the function of the search consultant, and the role of the Head's family in this process. This session welcomes spirited audience participation. The goal of this session is to provide knowledge, develop negotiating skills, and increase confidence among the participants.

KEYS TO SUCCESSFUL HEAD TRANSITION

Irvenia Waters, Executive Coach and Consultant, Strategic Perspectives Consulting and Waters Leadership Coaching, Lucinda Lee Katz, Head of School, Marin Country Day School, Steve Morris, Head of School, The San Francisco School, and Eric Temple, Head of School, Lick-Wilmerding High School

Pavilion Room

The conventional wisdom is that it takes three to five years for a new Head to settle into a headship. Why might that be the case? Could it happen sooner and/or more effectively? If so, what can Boards and Heads (outgoing and incoming) do to ensure a smooth leadership transition? This workshop will feature a conversation with three School Heads who have experienced this leadership transition at different stages in their careers. The panel will be moderated by a former Board Chair who has deep experience with schools in transition. This session will explore how school communities experience change, (drawing on William Bridges' work on transition), what is challenging for Heads and Boards in each of the initial years, and keys to success.

THE EVOLUTION OF THE TRADITIONAL LIBRARY INTO LEARNING COMMONS

Dwight Long, Principal, and Kami Kinkaid, Senior Project Manager, Pfau Long Architecture, Lisa Rosenstein, Head of School, The Willows Community School, and Elizabeth DuPuis, Associate University Librarian for Educational Initiatives & User Services Director of Doe, Moffitt, and the Subject Specialty Libraries UC Berkeley

French Room

Educators and designers are working towards a common goal: How do we evolve a traditional study space for learning? The "learning commons" concept is becoming increasingly widespread for libraries at public and independent schools, as well as at colleges and universities. One of the drivers of adopting a learning commons approach is to mirror the real world by encouraging a more hands-on approach to research and problem-solving. This session will explore the design, implementation, and utilization of a 21st century learning commons and ways to encourage collaboration through design. Topics will include the following: Why would a school want a learning commons? How does the concept of the learning commons impact the educational philosophy of the school? What is the best methodology for incorporating technology while balancing traditional methods of research and study?

Session Three 3:15 P.M. - 4:30 P.M.

PLANNING THE CAIS HEAD/BOARD CHAIR WORKSHOP: INPUT FROM BOARD CHAIRS

James McManus, Executive Director, California Association of Independent Schools

Venetian Room

About a year ago, after much thoughtful deliberation, the CAIS Board of Directors decided to refocus the Association's professional development efforts. Noting that teachers in independent schools have many options for continued learning, the Board committed to increasing resources and programs for trustees and heads, who have relatively few professional learning opportunities available that will help them to strengthen their partnership and to improve the craft of governance. Accordingly, CAIS offered two New Trustee Orientation workshops this fall, and both were sold-out events. The next new program to be instituted will be the Board Chair/School Head Workshop, to be held on Saturday, May 14. This session will invite suggestions for the content of that new workshop — especially from past, current, or rising Board Chairs. What lessons have experienced Chairs learned that could benefit new ones? What questions do rising Chairs have that would be especially helpful for such a workshop to explore? All perspectives will be welcome at this session, and they will be used to shape the new workshop about this unique partnership that is so crucial to a school's ultimate success.

USING DATA IN BOARD LEADERSHIP: RESOURCES FROM CAIS AND DASL

Hilary LaMonte, Senior Vice President of DASL (Data and Analysis for School Leadership), National Association of Independent Schools

Pavilion Room

The new CAIS accreditation process includes an important standard, (number 16), which states the expectation that schools will regularly use data and information to assess issues and inform institutional decision-making. Data is obviously most useful when it is relevant to the specific characteristics of a given school. CAIS and NAIS are collaborating to provide California schools with a platform and data source that allow administrators and trustees to mine data from independent schools throughout the state and across the country. Spanning such areas as admissions, financial aid, advancement, compensation, and financial operations, DASL provides tools with which a school can study trends and customize comparisons to the state, regional, and national levels. An individual school can also construct comparison groups of other schools with similar characteristics from California and beyond. This session will explain and illustrate the features of this database that are most useful to trustees and senior administrators as they lead the process of decision-making in key areas of their schools.

SMALL SCHOOLS & BIG DREAMS: BUILDING A CULTURE OF PHILANTHROPY TO ENABLE BIG CAMPAIGN SUCCESS

Duncan Lyon, Head of School, Mark Moore, President, Board of Trustees, and Devon Gold, Trustee, Past President and Capital Campaign Co-Chair, The Carey School

Gold Room

This session will focus on how a 250-student elementary school in San Mateo built a culture of philanthropy that allowed the school to raise the \$5 million necessary to fund a state-of-the-art new facility in 2014. The successful campaign required a multifaceted and well planned strategy that included, among other factors, a long history of 100% participation in the annual fund and well-articulated high expectations for leadership gifts. The Head of School, current Board Chair, and past Board Chair/Campaign Co-Chair will describe how these elements came together in a symbiotic way at the school.

IT TAKES MORE THAN A GOOD LEGAL TEAM TO PREVAIL WHEN LITIGATION IS USED AS A WEAPON

Elizabeth English, Head of School, and Barbara Bruser, Chair, Board of Trustees, Archer School for Girls, Lorri Palko, Executive and Prosperity Coach, Love, Money, Purpose, and Brian Walter, Partner Liebert Cassidy Whitmore

French Room

The vast majority of independent school community members cherish our schools, abide by school policies, and treat faculty and staff with the utmost respect. Nonetheless, cases of persons who take frivolous legal action against schools are on the rise. The use of litigation as a weapon creates new challenges for schools when email, the Internet, and social media are employed to communicate threats to the entire school community. Carefully vetted policies and enrollment contracts may not be sufficient to prevent damage to the school and staff, both personally and professionally. How, as educators, do we protect ourselves and our schools from malicious attackers and ultimately emerge with our integrity, dignity, and faith in humanity intact? More specifically: What is the role and responsibility of the Board in such a situation? What legal defense is there against a reckless attacker? What other experts should be engaged? What is the appropriate PR strategy? How can online and reputational assault be counteracted? This session will explore how school leadership can inoculate itself from such assaults and keep its focus on the work at hand.

SUPPORTING HEADS — SUSTAINING A FLOURISHING LEADERSHIP PARTNERSHIP

Tekakwitha Pernambuco-Wise, Head of School, and Amy Ramsey, Board Chair, Sea Crest School

California Room

Sustaining a flourishing Head-Board partnership is crucial for the health of a school. Taking the notion of Head support and evaluation a step beyond hiring and evaluating a Head, a survey completed by 207 Heads and 59 trustees provided data to examine how heads can be best supported by their Boards to form and nurture mutually beneficial relationships. The dialogue will center on three leading questions: 1. What types of support do heads most value from their trustees? 2. Do heads who lead different types of schools (e.g., K-8, 9-12, boarding, younger, etc.) and at different stages in their headship need different types of support? 3. Does head support have the same implications for heads as it does for trustees?

GOOD GOVERNANCE: FIDUCIARY DUTIES FOR TRUSTEES

Donna Williamson, Partner, and Grace Chan, Associate, Liebert Cassidy Whitmore

Terrace Room

Effective governance is essential for any Board. Yet the obligations of Board members— their legal duties and expected best practices— are frequently never relayed to them. This presentation will provide an overview of the fiduciary duties required of all trustees. It will explain the duty of care and duty of loyalty that should guide Board members in their representation of the school. The presentation will also discuss permissible delegation of duties by the Board to committees. It will address language that should be built into bylaws to avoid self-dealing transactions. Finally, it will address federal and state laws that protect trustees from individual liability.

BRAND CLARITY IS KEY TO YOUR LEADERSHIP AND TO YOUR SCHOOL'S SUCCESS

Scott Erickson, Head of School, Phillips Brooks School, and Ben Edwards, Principal, Art & Science Group

Grand Ballroom Lounge

Branding ultimately involves creativity but first requires objective analysis and frank, honest self-reflection by the Head and trustees about a school's value proposition. This session describes a deliberate and strategic approach to develop a competitive brand identity, while navigating and embracing the charged issues of school culture and leadership it takes to get there. When the Head and trustees consider their school's brand, what's at stake? A school wants to get its brand right, owing to aspirations: How can we attract more families who understand, are excited about, and are well matched to our culture, ethos, and approach to learning? At other times, we're worried about dissension: How can we reach more agreement internally about who we are? A school's success depends on brand clarity because it goes to the heart of its value proposition. Yet it's a risky and emotionally charged leadership issue centered on school culture and identity. This session will share how one school took on brand questions both aspirational and thorny, following a highly deliberate and strategic process: Identifying the problem (situational analysis), market research, setting a competitive positioning strategy, and launching a new brand. The session will also bring the national independent school landscape into view and will explore challenges and opportunities on the pivotal leadership issue of brand clarity. This session will also provide practical advice about the process that a school should follow, as well as improvements to fundraising, enrollment, and other expected outcomes.

TRIPLE THREAT: CRISIS MANAGEMENT, REPUTATIONAL RISK, AND BUSINESS CONTINUITY

Ronald Wanglin, Chairman, and Jamie Gershon, Senior Vice President, Bolton & Company, and Denise Gutches, President, DKG Consulting

Fountain Room

One of the greatest challenges facing independent schools today is the issue of crisis management and the threat to reputational risk and business continuity for the school. Whether it is the death of a student or faculty member, allegations of abuse or inappropriate conduct, natural disasters, or other factors, the financial model and long-term sustainability of the institution are at risk. This session will use case studies and actual claims to help identify best practices and strategic models for schools to follow in the event of a crisis.

ACCREDITATION AS CATALYST: WHAT A POWERFUL SELF-STUDY PROCESS CAN DO FOR YOUR SCHOOL

Julia Eells, Head of School, and Kate Garrett, Academic Dean, San Francisco University High School

Vanderbilt Room

The task of preparing for re-accreditation, while unquestionably important, can often feel extraneous to a school's core work and therefore distracting and even burdensome to complete. Participants will learn how one school successfully designed a self-study process that provided a powerful foundation for its subsequent strategic plan, while simultaneously deepening its sense of community as a faculty and staff and providing immediate and far-reaching value to the school as a whole. This session will share the carefully sequenced and differentiated conversations that were created that led to this outcome, as well as some of the structures, logistics, and communication strategies that were helpful. Participants will also engage in a dialogue about how they could adapt this process to fit their unique needs, and how to avoid some common pitfalls that can undermine the transformative potential of the re-accreditation process.

MISSION POSSIBLE: REVIEW, REVISE, AND COMMUNICATE A REFRESHED MISSION STATEMENT

Alona Scott, Head of School, Keys School, Zachary Roberts, Head of School, Gateway School, and Al Adams, Organizational Advisor, AlAdams.org

Hunt Room

The mission is the core of a school and also its guiding light. So why and when might a school community determine that a mission revision is strategically wise? And how might a school approach the process of revising its mission and ultimately the roll-out and messaging to the immediate school community and to the community at large? When done well, a mission revision revitalizes all constituents and brings buoyancy to the school. Two current Heads of School and a strategic consultant and former Head of School share inclusive and iterative processes for mission review, revision, and communication, reflecting the benefit of partnership between trustees and Heads of School.

INCLUSIVE FUNDRAISING PRACTICES

Virginia Paik, Head of School, Live Oak School, Luke Schemmel, Trustee, Live Oak School, Tesha McCord Poe, Director of Advancement, Castilleja School, and Trustee, Live Oak School, and Kendra Mastain, Director of Development, Live Oak School

Crystal Room

How can a school ensure that inclusivity is embedded in its culture of philanthropy and that its fundraising practices reflect its values of diversity and community? This session will explore the ways in which inclusive fundraising practices advance a school's mission, increase giving, and encourage engagement. What questions can a school ask to evaluate the level of inclusivity in its fundraising programs? What strategies can be implemented to improve upon practices? What roles do trustees, Heads of School, and development officers play in pursuing these goals?

Sunday, January 24

8:30 A.M. **BREAKFAST BUFFET**
GRAND BALLROOM

9:30 A.M. -
11:15 A.M. **Managing and Marketing to Generations X, Y
and V: How Understanding the Next
Generations Will Help You Better Reach Them**
Jane Buckingham
Founder and CEO, Trendera
GRAND BALLROOM

The future of work, education, and parenting is changing dramatically. By understanding the next generations and emerging trends, you will be better prepared to reach your intended audience and achieve desired results. This presentation will offer insights, data, and action steps for working with Generations X, Y, and V, with implications for enrollment, fundraising, and recruiting and retaining talent.

Upcoming Events

Proposed CAIS Strategic Plan - Feedback Session for Southern California Heads

February 1, 2016. Milken Community Schools, Los Angeles.

CAIS at NAIS

February 24 - 26, 2016. San Francisco.

Leading from the Middle

April 10 - 12, 2016. Palm Springs.

New Board Chair/School Head Workshop

May 14, 2016. Los Angeles - Registration opens in March 2016.

2016 Annual Meeting

June 19 - 21, 2016. Santa Barbara - Registration opens in Spring 2016.

See you next year!

2017 Trustee/School Head Conference

January 28 - 29, 2017

Four Seasons Westlake Village

