

2022 CAIS Trustee/School Head Online Conference
Sunday, January 30, 2022
[8a-3:30p](#)

8a-8:50a **Live Zoom Meetings for Board Committee and Heads of School Cohorts**
NB: These eight governance cohort meetings will **not** be recorded.

Advancement
Board Chairs, Vice Chairs, and Chairs Elect
Buildings and Grounds
DEIJ
Executive
Finance
Governance
Heads of School

9a-10a **Opening Session and Keynote Presentation**

Welcome and Opening Remarks

Dr. Deborah Dowling, Executive Director, California Association of Independent Schools
Steve Morris, Board President, California Association of Independent Schools, and Head of School, The San Francisco School

Courage of Our Convictions: A Roadmap to Antiracism

Dr. Valaida L. Wise, President and Principal Consultant, Dr. Valaida Wise Consultant, LLC

This multimedia presentation will unveil findings from the CAIS Antiracism Audit. The audit will guide the development and implementation of the strategic plan that will outline systemic interventions for promoting antiracism. A discussion concerning CAIS' signature strengths and opportunities for improvement will be a focus of the presentation. Join Dr. Wise at 10:15a (Session I) for a live Q&A.

10a-10:15a **BREAK**

10:15a-11a **Session I** **(12 workshops)**

11a-11:15a **BREAK**

11:15a-12p **Session II** **(12 workshops)**

12p-12:15p **BREAK**

12:15p-1p **Keynote Presentation-Bring your lunch!**

Board and Head: Post-Pandemic Collaboration, Part I

Rob Evans, Ed.D., Consultant
Michael Thompson, Ph.D., Consultant

The relationship between Board and Head has always been vital to an independent school's health. Two years into Covid and a national racial reckoning, it is increasingly under pressure. Trustees and Heads see the need to get moving—whether to reinvigorate the strategic plan and the capital campaign or to accelerate DEI efforts. But Heads are exhausted and whipsawed: every important decision is now too much or too little for some group. In this two-part program Featured Presenters Rob Evans and Michael Thompson will offer concrete ways for a Board and Head to strengthen their partnership and best serve the school.

Part II of Rob Evans' and Michael Thompson's keynote presentation begins at 1:15p (Session III).

1p-1:15p	BREAK
1:15p-2p	Session III (12 workshops)
2p-2:15p	BREAK
2:15p-3:30p	Keynote Presentation, Q&A, and Closing Remarks

A New Lens on The Work of Governance and Leadership

Donna Orem, President, National Association of Independent Schools

The pace of change today often leaves school leaders and Trustees feeling like they are in a constant state of catching up, sometimes resulting in the school facing unintended consequences or missed opportunities. In the worst-case scenario, this inability to effectively lead and govern through rapid change can totally destabilize a school community and erode trust. When leadership and governance work together, like an orchestra playing an exquisite symphony, these pitfalls can be avoided. We will explore how Heads and Trustees can develop workable strategies for success in their particular context, and create alignment around structures, processes, and programs.

Closing Remarks

Dr. Deborah Dowling, Executive Director, California Association of Independent Schools

10:15am-2:00pm - 3 Sessions/36 Workshops - [View Schedule](#)

Annual Legal Update for California Independent Schools, Part I

Michael Blacher, Partner, Liebert Cassidy Whitmore
Donna Williamson, Partner, Liebert Cassidy Whitmore

What a year! The courts, the legislature, and local agencies have not made things any easier. This presentation will review the most important cases, new state laws, and regulations of the past year. We will focus on the implications of these developments for California independent schools and discuss how Heads of School and Board members can be proactive in light of them. Come prepared to ask questions and share experiences!

Liebert Cassidy Whitmore is an approved MCLE provider. Participating attorneys who attend Parts I and II are eligible for 1.5 hours of MCLE.

Annual Legal Update for California Independent Schools, Part II

Michael Blacher, Partner, Liebert Cassidy Whitmore
Donna Williamson, Partner, Liebert Cassidy Whitmore

Join us for the continuation of this legal training.

Liebert Cassidy Whitmore is an approved MCLE provider. Participating attorneys who attend Parts I and II are eligible for 1.5 hours of MCLE.

An Unbiased View of the Interim Headship

Lila Lohr, Interim Search Consultant, Educational Directions

Amy Richards, Partner, Educational Directions

In this session, two former Heads of School will demystify the interim headship. Participants will learn when and why it's a good idea, how to tee up for success--both the school and the Interim Head--tips and traps, and more. This workshop will appeal to not only Heads who are nearing retirement, but also to schools that may be facing a planned or unanticipated Head transition.

Becoming a Children's Defense Fund Freedom School Site

Kristal Moore Clemons, National Director, CDF Freedom Schools ®

Janeen Jackson, Site Administrator, Freedom School ® Project, Crossroads School

Bob Riddle, Head of School, Crossroads School

Rooted in the Mississippi Freedom Summer project of 1964, the Children's Defense Fund Freedom Schools program serves children and youth in grades K-12 in communities where quality academic enrichment programming is limited, too expensive, or nonexistent. Participants will learn about our experience hosting a Freedom School this past summer, the impact it had, the community partnerships and collaborations that developed, and why and how other independent schools might consider becoming a Freedom School site.

Board and Head: Post-Pandemic Collaboration, Part II

Rob Evans, Consultant

Michael Thompson, Consultant

Join Rob Evans and Michael Thompson for Part II of their keynote presentation.

CAIS Accreditation: Trends in Major Recommendations and Areas of Strength

Teal Gallagher, Director of Member Engagement, California Association of Independent Schools

Mariana Robles, Director of Accreditation, California Association of Independent Schools

In this session, presenters will provide an analysis of the trends in Major Recommendations given by Visiting Committees in the last six years. Participants will hear about the most prevalent recommendations and how they compare to the larger landscape of education reform. Presenters will also provide insight into the types of changes schools are making to address these recommendations and transform areas of growth into strengths.

Courage of Our Convictions: A Roadmap to Antiracism

Dr. Valaida L. Wise, President and Principal Consultant, Dr. Valaida Wise Consultant, LLC

Join Dr. Valaida L. Wise for this live interactive Q&A followup to her keynote presentation.

Crisis 2.0 – From the Basics to the Boardroom

Jane Hulbert, Co-Founder, The Jane Group

Jim Hulbert, J.D., CEO and Co-Founder, The Jane Group

This past year, crises have been more challenging and complex than ever. In this session, participants will review crisis basics, first steps to take, and how to develop the response--often the most difficult step--taking into account the facts, optics, and stakeholder considerations. Presenters will share best practices for school leaders and the Board of Trustees. We will also consider the importance of talking points and messaging for both the Board and leaders.

Evidence-Based Accountability Plans: Measuring Progress Toward Strategic Goals and Accreditation Recommendations

Anne-Marie Balzano, Senior Governance Strategist, Mission & Data
Kelsey Vrooman, Co-Founder and Partner, Mission & Data

Leaders and Trustees want their school to be rooted in mission-driven, data-informed decision making, yet many schools struggle to turn strategic plans, visionary initiatives, and accreditation recommendations into action and effectively communicate progress to the Board. In this session, participants will learn about research-based processes for building robust accountability plans. Presenters will explore how to align success metrics to strategic goals and accreditation recommendations, share strategies on how to measure subjective goals such as joyful learners or engaged students, and share examples of effective strategic plan dashboards.

Evolving the Committee on Trustees (CoT): Infusing Intention to Ensure Impact

Betsy Berman, Chief Advancement and Strategy Officer, Crystal Springs Uplands School
Becky Logan, Trustee, Crystal Springs Uplands School
Kelly Sortino, Head of School, Crystal Springs Uplands School
Cristal Waldrop, Board Secretary, Crystal Springs Uplands School

Is your Committee on Trustees on “rinse and repeat” mode? During this interactive session, learn how a group of Trustees infused intention and innovation in order to evolve the CoT into one of the school's most impactful Board committees. Participants will reflect on their own CoT and identify ways to infuse a data-driven approach, intentional recruitment and onboarding, and ongoing training into their CoT practices right away.

From Data to Equity-Minded Action: Strategies to Analyze, Interpret and Act on Data through an Equity Lens

Erin Neubert, Humanities Chair and Assistant Professor, National Louis University
Tracy Templin, Executive Director of Strategy and Operations, National Louis University

This workshop will provide tools and strategies to use data disaggregated by demographic groups, to improve student outcomes with an equity-minded lens. Participants will learn and apply a framework to help understand the importance of disaggregating data by demographics, how to facilitate equity-minded dialogue to engage with the data, and how to take action on the data to further student success. Workshop leaders will present a case study from National Louis University, where data was used to surface and address inequitable student outcomes both in college wide and department team settings. After the case study, participants will engage in a discussion to explore how the model may be applied in different teams and contexts. Finally, participants will reflect and begin to plan how they can apply components of the model at their own institution.

Fundraising For The Future: Why it is Critical to Keep your Foot on the Gas and off the Brakes

Jeff Berndt, Director of Institutional Giving, Thacher School
Karen Callahan, Senior Consultant and Principal, Marts & Lundy
Christian Sockel, Assistant Head of School for Institutional Giving, The Hill School
Taylor Stockdale, Head of Schools, The Webb Schools

If one thing is certain, it's that no one knows what the future holds. For independent schools, being well-resourced can make possible new infrastructure, short-term facilities or staffing needs, or just downright staying power. Some of the lessons learned over the past year are worth remembering and taking to heart when it comes to future planning. Better inform your own planning by hearing from three institutions who've experienced considerable success through this pandemic because of leaders committed to forward thinking through crisis.

Got a Vision for DEI? An Hour to “Dream a Little Before We Think”

Alison Park, DEI Consultant & Founder, Blink Consulting
Stacey Kertsman, DEI Consultant, Blink Consulting

The past year has seen significantly more activity for and against DEI commitments in schools. As more people in our communities drive the work forward, inspired by their own ideas about “what we should be doing,” yet others resist the work, worried about “where all of this is heading.” It is increasingly evident that schools need to provide an aspirational vision for DEI. We’ll spend this session “dreaming a little” about DEI: what it could be about, and what it could achieve.

Governance by Design: An Intentional and Strategic Approach to Improving School Governance

Lee Fertig, Head of School, The Nueva School
Bonnie Fought, Governance Committee Chair, The Nueva School

Independent schools often emphasize the need for continuous improvement in teaching, learning, and operations. This is what we do in educational settings; constantly strive to improve and get better at what we do. But why do we not always apply this same ethos to school governance? Why do we not hold ourselves accountable for continuous improvement at the Board level as well? This session directly addresses the importance and potential of applying effective, research-based governance practices in schools so that a Board’s impact on the community can be maximized.

Governance: Gauging the Effectiveness of the Head of School and Board Chair Partnership

Lucinda Lee Katz, Educational Consultant, Carney Sandoe & Associates
Irvenia Waters, Executive Coach and Consultant, Waters Leadership Coaching

Much has been written about the importance of the Head of School and Board Chair relationship, but assessing the relationship’s effectiveness has been less well studied. This workshop takes a close look at this important partnership and offers a framework for gauging its effectiveness in five key areas—context and commitment, clarity of roles, care for one another, communication, and change management.

Gut Check: Reducing Bias in Leadership Searches

Jo Butler, Founder & Principal, Butler/White Strategies
Zachary White, Principal, Butler/White Strategies

Hiring a new school leader is a high-stakes decision for any Board, yet many search committees rely on traditional practices that can lead them to overlook candidates with potential flaws and/or applicants with hidden strengths. Drawing on recent research on bias and decision-making, this session will offer practical advice for Heads and Trustees who want to assess candidates more clearly and make better hiring decisions for their school.

How Does a Board Respond When Everything’s on Fire? Preparing for and Managing through COVID

Marc Frankel, Trustee, Wildwood School
Landis Green, Head of School, Wildwood School
Susan Olsen, Board Vice Chair, Wildwood School
Andrew Solmssen, Board Chair, Wildwood School

What do you do when a crisis hits, and what do you wish you’d already done? In this session, participants will learn how long-term Board governance and administration partnership prepared one school to be as ready for 2020 as possible. Hear about their focus on nimble process, strategic planning, Board training, hypothetical “doomsday” scenario preparation, Board education, and fundraising during one of the most challenging periods for independent schools on record.

How to Lead an Inspiring Strategic Plan That is Student Focused Rather Than Operations Driven

Andrew Davis, Head of School, Mt. Tamalpais School

Romayne Levee, Director of Education Strategy, Mission Minded

Strategic planning, though essential, can also be a long, tedious process filled with meetings that don't yield truly fresh thinking. Learn a new framework that makes student learning outcomes, not school operations, the focal point. We'll share an exciting case study that can act as your blueprint and lead to your next strategic plan being truly extraordinary, with all stakeholders inspired and aligned.

Courage of Our Convictions: A Roadmap to Antiracism

Dr. Valaida L. Wise, President and Principal Consultant, Dr. Valaida Wise Consultant, LLC

Q&A session following Dr. Wise's opening keynote address.

Measuring Your Mission and Vision: Systems of Data Collection and Analysis

Jeneen Graham, Upper School Principal, St. Margaret's Episcopal School

Chris Mazzola, Head of School, The Branson School

How does a school hold itself accountable to the delivery of the mission? What markers should schools track for mission accountability? In this session, we will examine two case studies where systemic data collection and analysis led to the comprehensive measurement of school mission and vision. Presenters will share the questions that contributed to the development and adoption of qualitative and quantitative measures that led to a comprehensive assessment of mission and vision fulfillment. Hear our approach to ensuring that we are living up to the promises we've made to ourselves, our students, and our families.

Mission Possible: The Mission Statement as Phase 0 of Strategic Planning

Rose Helm, Head of School, The John Thomas Dye School

Stacey Walker King, Trustee, The John Thomas Dye School

Chris Pryor, President, Gowan Group

Mike Vachow, Managing Director, Gowan Group

The development of a strategic plan often requires mapping priorities to the school's Mission Statement. This presentation will showcase the collaboration between a school and strategic planning consultants to add an additional component to the strategic planning process, "Phase 0," which would occur before the traditional first phase of research and discovery. In "Phase 0," a school looks critically at its current Mission Statement, and possibly even revises or rewrites it, so that it can serve as a guide in the subsequent phases of the strategic planning process.

The National Enrollment Action Roundtable (NEAR): Combatting Enrollment Decline Together

Khadija Fredericks, Head of School, St. Andrew's Episcopal School

Arlene Hogan, Head of School, Bentley School

Laura Konigsberg, Head of School, Turning Point School

Zachary Roberts, Head of School, Gateway School

Nearly half of NAIS schools face enrollment decline, with many struggling in isolation. The National Enrollment Action Roundtable (NEAR) is a no-cost, grassroots coalition of over 200 schools that have united to fight back. Led by two CAIS Heads of School, NEAR contends we have within our schools the expertise we need; by collaborating, we help one another prevail. We'll describe how NEAR works, discuss its value-added for CAIS schools, and lead a Q&A.

Navigating a Challenging and Turbulent Insurance Market for Independent Schools

Jamie Gershon, Executive Vice President, Bolton & Company

Ronald Wanglin, Chairman, Bolton & Company

The availability and affordability of business insurance for educational institutions has changed dramatically in the last 12 months. Coverage limits are down, pricing has increased, and new coverage restrictions are being added that impact how your policy may respond in the event of a claim. Learn how these changes are impacting fiduciary oversight by the board and strategies for navigating a rapidly changing marketplace.

New Directions in Effective Head Support and Evaluation

*Mark McKee, President and Head of School, Viewpoint School
Jill Schechter, Board Vice Chair, Viewpoint School*

New approaches to Head Support and Evaluation can foster a climate of trust and clarity of purpose that strengthen the Head-Board relationship and improve the performance of both the Head and Trustees. In this session, participants will hear an experienced Head of School and Board leaders describe their process and positive results achieved in establishing a committee that provides authentic and meaningful support for the Head and for next-level governance.

Operating in a COVID World

*Linda K. Adler, Partner, Liebert Cassidy Whitmore
Brett A. Overby, Associate, Liebert Cassidy Whitmore
Stacy L. Velloff, Associate, Liebert Cassidy Whitmore*

Schools are still dealing with COVID! This presentation will provide a wide-ranging overview of current laws, updated regulations, and best practices. It will address responding to COVID exposures and outbreaks, compliance with privacy laws, managing employee leaves, addressing accommodation requests, COVID testing and vaccinations, and more. We will discuss the issues you should be thinking about now for next year.

Liebert Cassidy Whitmore is an approved MCLE provider. Participating attorneys are eligible for 0.75 hour of MCLE.

Protecting Yourself and Your Business – Let’s See What You’re Up Against

Adam Alexander, Client Cybersecurity Representative, Information Security, First Republic Bank

Cybercriminals view nonprofits and independent schools as easy prey sitting on a wealth of personal information about their support staff, clients and donors. Many nonprofits may think they’re not big enough to be a target. However, their smaller size is one of the things that makes them even more appealing to cyber thieves. Most of us think we have taken the right protections to keep our accounts safe from fraudsters...but what happens when these bad actors infiltrate the accounts of our business partners and send requests from these legitimate sources? Do we have processes in place to protect us from these threats? Join First Republic Bank for this engaging session to dispel the myths around cybersecurity. Attendees will receive real-time updates on the most commonly used fraud tactics, learn how to identify messages from genuine contacts vs. fraudsters, and develop strategies to best protect themselves and their organizations.

Recruiting for a Diverse Board

Brooke Carroll, Principal Consultant and Coach, Acies Strategies

To be effective, boards need engaged, strategic, collaborative, and diverse members. Yet many boards do not follow a clear process to identify needed characteristics of Board candidates and struggle to recruit members who bring a diversity of perspective. In this workshop Board members will learn a process they can implement immediately to enhance their recruitment practices and expand the diversity of their Board.

Risk-Free Donations and Faultless Fundraising

*Heather DeBlanc, Partner, Liebert Cassidy Whitmore
Laura Konigsberg, Head of School, Turning Point School*

This session will focus on California and federal laws relating to fundraising, gifts and donations, endowments, and acknowledgments. We will explore best practices to avoid risk and liability associated with fundraising events, including how to spot issues at the planning stages.

Liebert Cassidy Whitmore is an approved MCLE provider. Participating attorneys are eligible for 0.75 hour of MCLE.

Safety & Security: Navigating Physical Security, Cyber Security, and Health during the Pandemic

Omar Duenas, Director of Technology, The Center for Early Education

Eric Esrailian, Trustee, The Center for Early Education

Erika Johnson, Assistant Head of School for Operations, The Center for Early Education

David Messinger, Board President, The Center for Early Education

In 2019, our Board of Trustees established a Safety & Security Committee, comprised of administrators and Trustees, to focus on physical safety and cyber security. Little did anyone know, a short time later, a global pandemic would impact every community around the world and create new challenges for independent schools. Hear how this committee quickly reoriented itself to the many challenges imposed by the pandemic without losing sight of its original intent. We will explore learnings from the past which can help to inform the future for any school contemplating how to manage through change.

Small School, Big Campaign

Jennifer Chung, Board Chair, The Carey School

Duncan Lyon, Head of School, The Carey School

Learn how a 260-student elementary school built a culture of philanthropy that allowed the school to raise the \$5.1 million necessary to fund a state-of-the-art new facility in 2021 amid the pandemic. The successful campaign required a multifaceted and well planned strategy that included a strong foundation of broad support for the annual fund and well-articulated high expectations for leadership gifts. The Head of School and a Trustee will describe how these elements came together in a symbiotic way at the school.

Three Secrets of the Entrepreneurial School

Scott McLarty, Head of School, Providence High School

Dana Nelson-Isaacs, Founder and Principal, DNI Consulting

Chad Tew, Founder / Chief Disruption Navigator, LearnCollab

Entrepreneurial schools supercharge innovative thinking with market data and an expansion mindset. Learn why school expansion, market research, and collaboration/acquisition should be on the agenda for every school looking to build a stronger market position and improve financial sustainability.

Top Ten Risk Management Topics For Heads of Schools and Board Chairs In 2022

Sara Schwartz, Founder and President, Schwartz Hannum PC

In this session, participants will hear from an experienced education and employment lawyer who will facilitate a conversation about 2022's top legal issues facing independent Heads of School and Board Chairs.

Trends and Issues in School Affordability through COVID-19

Mark Mitchell, Vice President, National Association of Independent Schools

The impact of COVID-19 on all aspects of school operations is deep and complex, including financial aid and enrollment demand. Based on key trends and issues explored in the NAIS 2021-2022 Trendbook, this session will explore the dynamics driving schools' responses to the affordability pressures impacting families. While each school's situation and solutions may be unique, there are questions and considerations school boards should be addressing to weather any continued economic effects of the ongoing challenge.

Trusteeship 101/102: The Challenge Before Us

Robert Friedman, Board Chair, Turning Point School

Claudia Lewis, Board Chair, The Branson School

Deborah Reed, Consultant, RG175

Alan Wilson, Board Chair, Harvard-Westlake School

In this session, we will review the partnership between Board and Head. Hear a panel of Board Chairs discuss the challenges presented to all Trustees, especially those in their first years. We will turn to scenarios revolving around common questions that Trustees and Heads grapple with: affordability of tuition fees, the conflicts around commitments to anti-racist policies/programs, and the ongoing challenges of COVID-19.

Understanding and Supporting Female Leaders and Leaders of Color at Independent Schools

Amada Torres, Vice President for Studies, Insights, and Research, National Association of Independent Schools

Independent school leaders in general have borne the brunt of many overlapping crises over the past year, resulting in significant emotional and psychological strain. What has been the experience of female Heads and Heads of color during this period? This session will explore national trends in leadership, key needs of today's Heads, vulnerabilities in the role, and some strategies for both self-care and Board-Head support systems.

What Research Suggests on Why Heads Leave and Why Heads Stay

Kevin Yaley, Head of School, Francis Parker School

Independent schools across the country continue to experience an increasing number of Head vacancies, both expected and unexpected. Other than the departures by Heads who are retiring or chasing greener pastures, the reasons why an increasing number of Heads are departing at a disquieting rate are as enigmatic as the departures themselves. And there is no easy mechanism for researching what factors might influence these departures. Information is hard to come by because of both the need for confidentiality as well as the desire for schools to communicate departure decisions in an amenable and mutually beneficial manner to minimize the inevitable disruptions. However, what can be researched are the factors that might influence the retention of Heads—in particular, Heads who are currently enjoying a longer-than-average tenure at their current school. This session will share results from a recent NAIS supported research study of 312 Heads from independent schools across the country which sought to identify potential factors that motivate Heads to stay or go, including relationships between Heads and Board Chairs, and investigate to what extent these factors influence the Heads' job satisfaction and their decisions to remain in their current positions. Outcomes will include: 1) a deeper understanding of the key aspects of the Head and Board Chair partnership which influence, at least to some degree, a Head's decision to remain at their school; and 2) the case for a deeper investment in the Head-Board Chair partnership and an understanding of the preferred manner in which Heads choose to lead.