

A View from Both Sides of the Boardroom “Life Rules” for Today’s Trustees

BY RICHARD JUNG

Four “Life Rules” form the core of the social curriculum at Beauvoir, The National Cathedral Elementary School (Washington, DC), where I’ve had the honor to be a parent for eight years and now a member of the governing board. Beauvoir believes that “all children can uphold the school’s Life Rules of being *respectful, responsible, honest, and kind learners.*” Yet these rules are not just for the children; the school also expects adults — and especially adult leaders — to live and model these values. In the realm of governance, these cornerstone character traits are certainly worth etching on the cornices of any boardroom.

But as one who has served on both sides of the board table for the past 20 years, as a head of school and a trustee, I have developed an appreciation of four additional “Life Rules” specifically designed for those serving on today’s independent school boards. They’re not as easy to etch on the cornices, but they are still worth committing to heart and mind. From my experience, boards that embrace these four guiding rules are well-functioning boards that lead well-functioning schools.

Life Rule One: Know that the Successful Head Must Tack Between the “Pastor and CEO”

The fall 1998 issue of *Independent School* pictured on its cover a seated Earl Harrison in animated conversation with a group of students. Then recently retired as head of Sidwell Friends School (Washington, DC), Harrison was interviewed by the magazine about the “Changing Aspects of Headship.” In his concluding piece of advice, which gave the article its title, “Between the Pastor and CEO,” Harrison noted: “I would hope that whoever aspires to become the head of a school will try to operate in the comfort zone between the pastoral and executive responsibilities of the position.”

Board leaders can also benefit from heeding Harrison’s sage advice when picking, evaluating, and supporting their heads of school. The now popular *Good to Great* organizational guru, Jim Collins, ascribes the subtitle “Why Business Thinking is Not the Answer” to his “Social Sectors Monograph to Accompany *Good to*

Great.” “Business thinking” is only part of the answer; today’s heads must tack successfully between their corporate and clerical tasks. Along with getting the business of education right, a good head also cares for the spirit, the soul, the heart, and the health — the caring supportive culture — of the school. In searching for a school head, boards should look for a candidate who embodies this duality, and then they should do what they can to support the head as he or she tacks between these leadership roles.

Life Rule Two: Make the Board’s Mantra: “Cultivate an Institutional View”

When I started as head at The Bullis School (Maryland) in 1991, David Pensky, the chair of the search committee who then became my first board chair, made his first order of business developing a board with an “institutional view.”

At that time, Bullis was evolving from being a family-run school, with a board that often held insular notions about trusteeship. For example, several board members considered an important aspect of trusteeship to be a sounding board for parents who had complaints about the school or their child’s teacher — still not an uncommon phenomenon in many independent schools today.

Having taken one of his primary responsibilities quite seriously — the hiring of a new head of school from outside the Bullis community — Pensky, founder and then president of his expanding Britches of Georgetowne clothing company, researched board literature and what it said about not only independent school boards but also about boards of other nonprofits. He discovered that what separated nonprofit boards of trustees from other advisory and constituency groups was that these boards, regardless of mission, had responsibility for the viability and health of the institution as a whole over both the short and long term. Applied to independent schools, this meant that — regardless

of the centrality of students, faculty, parents, and alumni — none would be served well unless the board of trustees kept “an institutional view” in conceiving the nature of its governance role and in making decisions.

And we discovered over time that the rallying cry of maintaining an “institutional view” resonated more with our board members than the legalistic “fiduciary responsibility” catch phrase often used to describe a board’s primary role.

Life Rule Three: Ensure Effective “Transition” and “Traction” within the Boardroom.

With a large cadre of heads reaching retirement age, “transition” and “traction” will become two increasingly important themes in independent school boardrooms. Transition plans for board leadership have always been important, but they will become all the more critical in the coming years. A record number of heads of school are now or will soon reach retirement age. Accordingly, soon more independent school boards can expect to face the challenges, costs, and perils of searching for, attracting, and hiring a new head of school. Understandably, one of the first questions a good head of school candidate asks is, “Who will be the board chair and leadership with whom I’m going to work?” The schools with the best answers will often land the best heads.

Triangle Associate’s newsletter, *Leading Trends* (January 2006), poses the question: Why do “Good [Strategic] Plans Lack Traction”? At the top of the list is the “absence of a *powerful internal champion... who takes it upon him or herself to drive implementation and monitor progress*” of the plan. So, the key questions for independent school boards today are not only: “Who will lead the school today and tomorrow?” but also “Who will lead our strategy-making efforts and integrate them into our day-to-day operating and assessment activities?”

Life Rule Four: Enrich Your Board Expe-

rience and Enrich the School

Dick Chait and his co-authors in BoardSource’s *Governance as Leadership: Reframing the Work of Nonprofit Boards* argue for an expanded view of nonprofit trusteeship. They observe that the most effective independent school boards operate on three levels simultaneously. On the fiduciary or oversight control level, the board makes sure that the school is “doing things right” (*i.e.*, good fiscal audits). On the strategic direction level, the board is responsible for assuring that the school is “doing the right things” (*i.e.*, developing plans with goals and benchmarks). Beyond these traditional fiduciary and strategic responsibilities, they argue for boards to be partners with school leaders in generating and communicating a vision for the school.

This partnership functions well only when board members become active, engaged learners. Complacency leads to stagnation. And stagnation leads to irrelevancy. Just as they expect the rest of the school community — students, teachers, and administrators — to be engaged learners, active boards need to embrace their own learning. Specifically, they need seek out and grow from challenges to the institution. For instance, they should pay attention to the sobering wake-up call Ron Goldblatt, executive director of the Association of Independent Maryland Schools, provides in his presentations to boards about teacher supply and demand, or from Donna Orem, chief operating officer at the National Association of Independent Schools (NAIS), as she outlines in her board presentations defining demographic, social, economic, and educational trends critical to the quality of a new strategic planning efforts. NAIS now makes available to schools, boards, and board members a wealth of information and data to support this expanded view of trusteeship, including a new “webinar” feature on its website, probing pressing issues in independent schools. State and regional associations of independent schools also often offer their members valuable resources so that board members can become the informed and in-

spired generative leaders required for this expanded view of trusteeship.

Almost regardless of the schools we choose to serve, or the way we choose to serve them, we are called to support and model the schools’ core precepts. We want to live our lives, of course, as respectful, responsible, honest, and kind adults. To serve most effectively in the boardroom, however, we might augment these traditional precepts with these four “Life Rules” for today’s trusteeship tasks.

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