

TRUSTEE

Series

A year-long program offering ten one-hour webinars tailored to meet the evolving needs of independent school boards.

Trustee Series webinars feature governance topics that enhance the health & efficacy of your board with one session dedicated to supporting board chairs (current & incoming). Elevate your board's performance & impact by enrolling your school in the 2026–27 Trustee Series.

Enrollment & Registration

Only **one person needs to enroll** your school. Your school **pays only one fee.**


After enrolling, all who plan to attend the live webinars or access the recordings & resources must register on Zoom.


\$600 per school for members of:

- Association of Colorado Independent Schools (ACIS)
- Association of Independent Schools of Greater Washington (AISGW)
- Elementary School Heads Association (ESHA)*
- Hawaii Association of Independent Schools (HAIS)
- Independent Schools Association of the Southwest (ISAS)
- New York State Association of Independent Schools (NYSAIS)
- Pennsylvania Association of Independent Schools (PAIS)

Your enrollment fee covers your entire board & head of school for all 10 webinars. There are no refunds for the Trustee Series.

HOW IT WORKS:

 **One person enrolls** on behalf of the school so that

 your school's **trustees & head** can then **register** on Zoom **individually.**

PARTICIPATING ASSOCIATIONS

Enroll in the Trustee Series through your association to receive the ISACS member rate.*

* ESHA member schools should register directly through ISACS.

Thursdays, 3-4 p.m. CT / 4-5 p.m. ET

- September 24** Strengthening Board Culture: What Matters Most
- October 15** Strategic Financial Planning for Trustees
- November 19** Board's Role in Fundraising
- December 10** Top of Mind Topics for Boards Today
- January 21** Mission & Market Alignment: National Trends Driving Parent Enrollment Decisions
- February 11** Building a Board That Performs
- March 18** Legal Trends & Governance Challenges for Independent School Trustees
- April 29** Board's Role in Navigating Turbulent Times
- May 6** Board Chairs & Heads: Better Together—The Work Beneath the Work 🏠
- May 13** Governing with Clarity, Strategy & Purpose: An Orientation for Board Members

The May 6 webinar will not be recorded. All other webinars will be recorded & available until **June 30, 2027.**

webinars

September 24, 2026

3–4 p.m. CT / 4–5 p.m. ET

Strengthening Board Culture: What Matters Most

Board culture does not happen by accident—it is shaped over time through shared purpose, intentional practices, and the quality of relationships around the table. Explore a framework for understanding and strengthening board culture through three interconnected lenses: purpose, process, and people. Together, we will examine how clarity of role and responsibility, effective governance structures, and a culture of trust influence a board's ability to lead well.

Presenter: Anne-Marie Balzano, EdD is Mission & Data's governance and strategic planning practice lead, partnering with independent school boards and heads to strengthen governance, lead strategic planning, and support long-term sustainability. A former head of school, associate professor, and director of leadership and governance at the National Association of Independent Schools (NAIS), she brings a multi-layered perspective to the complexities of school leadership. Balzano is a regular presenter for NAIS, working with new and aspiring heads on effective governance and strong board-head partnerships, and she serves as a trustee at The Buckley School (CA).



October 15, 2026 3–4 p.m. CT / 4–5 p.m. ET

Strategic Financial Planning for Trustees

Trustees play a critical role in ensuring their schools' financial sustainability. Participants will explore the knowledge, skills, and capacities trustees need to govern effectively for financial strength. We will examine key issues and challenges trustees face in financial oversight and discuss specific strategies and approaches to support long-term stability.

Presenter: James P. Honan, EdM, EdD is a senior lecturer at the Harvard Graduate School of Education and a faculty member at the Harvard Kennedy School, where he also serves on the faculty executive committee of Harvard's Advanced Leadership Initiative. He has consulted on strategic planning, governance, and resource allocation for colleges, universities, schools, foundations, and nonprofit organizations. Honan holds a BA from Marist University, an MA from George Washington University, and an EdM and EdD from Harvard University.



November 19, 2026 3–4 p.m. CT / 4–5 p.m. ET

Board's Role in Fundraising

How can trustees partner most effectively with school leadership to elevate philanthropic giving? Explore the vital role engaged board members play in the fundraising ecosystem. Join Harris, a successful fundraiser for her school, to learn how to navigate the philanthropic cycle with confidence, support the development office, lead by example, and translate the school's strategic vision into philanthropic success.

Presenter: Donna Harris, EdD has served as president of Minnehaha Academy (MN), a PK–12 Christian school, since 2009. She began her career as a teacher in public schools before moving into independent school administration. Harris is an adjunct professor at Baylor University in the School Leadership Program and has served as a trustee and board chair for ISACS as well as on several nonprofit and independent school boards. Her leadership was instrumental in guiding Minnehaha Academy through the aftermath of a deadly gas explosion in 2017; under the banner "Together We Rise," she led a rebuilding and restorative effort completed in August 2019.



December 10, 2026 3–4 p.m. CT / 4–5 p.m. ET

Top of Mind Topics for Boards Today

What should be top of mind for independent school boards today? The answer varies by school, of course—but in this webinar, we'll focus on the issues that consistently matter most: how to best support and partner with your head, what AI means for the relevance of your educational program, the cost of attending your school, and the delicate art of strong board governance—staying out of the weeds while still asking the questions that matter. Expect a conversation that is practical, candid, and grounded in real experience—with just enough irreverence to keep it lively and engaging.

Presenter: Bernie Noe is the co-founder of The Leader Network, which partners with independent school leaders, boards, nonprofit executives, and mission-driven organizations to strengthen leadership at every level. He previously served as head of school at Lakeside School (WA) and held leadership roles at Sidwell Friends School (D.C.). Noe served on the National Association of Independent Schools (NAIS) board of trustees and served as the founding board chair of Global Online Academy. He has served on the board of School Year Abroad and currently serves on the board of Rainier Scholars.



January 21, 2027 3–4 p.m. CT / 4–5 p.m. ET

Mission & Market Alignment: National Trends Driving Parent Enrollment Decisions

How can independent school leaders create brand messages that cut through the noise and articulate a compelling value proposition in a time of flux? In this session, Flanagan will identify key societal trends shaping independent school enrollment, share detailed research on how parents make decisions about independent schools, and guide participants through clarifying their value proposition. He will share lessons learned from building brand messaging frameworks that resonate with families.

Presenter: Mike Flanagan is the inaugural Chief Executive Officer (CEO) of E3n, an organization formed from the merger of The Educational Records Bureau (ERB) and the Enrollment Management Association (EMA). His 30 years of leadership experience in nonprofit associations and educational technology include serving as CEO of the Mastery Transcript Consortium, CEO of School and Student Services by NAIS, and co-founder and EVP of Client Services at Intrepid Learning Solutions.



February 11, 2027 3–4 p.m. CT / 4–5 p.m. ET

Building a Board That Performs

Great governance starts with having the right people on the board and a rigorous approach to putting them in place. Board composition deserves the same strategic discipline as any high-stakes talent decision. Using a proven framework, this webinar will equip participants with practical tools to assess current board composition, define key criteria for future members, and establish sustainable practices for sourcing, selecting, onboarding, and developing a high-performing board.

Presenter: Georgy Ann Peluchowski is a partner at Greenwich Leadership Partners with decades of experience in financial services, nonprofit board service, strategic planning, organization design, enterprise risk management, and independent school leadership. Within her 12-year tenure as a trustee at the Latin School of Chicago, she served as board chair, treasurer, and chair of the finance committee. Currently, she co-chairs Latin's Senior Advisory Council and serves on the boards of the Independent School Chairperson's Association and High Jump Chicago.



Presenter: Stephanie Rogen, principal and founder of Greenwich Leadership Partners, is a consultant, coach, and facilitator to educational and nonprofit boards and leaders. Rogen works with nonprofits ranging from Columbia University to The White House Project and Northwell Health and is a guest lecturer at the UPenn Graduate School of Education. She is a trustee for College Unbound and has served on the boards of the HTH Graduate School of Education, Blair Academy, St. Luke's School, Year Up, and the Greenwich United Way.



March 18, 2027 3–4 p.m. CT / 4–5 p.m. ET

Legal Trends & Governance Challenges for Independent School Trustees

Trustees are charged with driving strategic change. Yet any school's history will include successful change initiatives and others that failed to thrive. This session examines stages of change and levers leaders can apply when implementing strategic changes. Explore how to examine the environment and community readiness for change as well as the groundwork needed prior to getting started. Learn, as change unfolds, how to monitor successes and barriers. Even as the new status is accepted and established, how does that new status become the foundation for further growth?

Presenter: Kristin Smith is a partner in the Houston and Minneapolis offices of Fisher & Phillips LLP and co-chair of the firm's education industry group. Her practice focuses exclusively on independent and private schools, assisting them with student and employee discipline, contracts, handbooks and policies, LGBTQ issues, board governance and training, discrimination claims and EEOC charges, training and development, family court entanglements, and investigations, litigation, arbitration, and mediation.



April 29, 2027 3–4 p.m. CT / 4–5 p.m. ET

Board's Role in Navigating Turbulent Times

Board roles and engagement with school leadership have shifted dramatically over the last 15 years. Key changes in the landscape call on boards and school leaders to work together in new ways and to build deeper skills as the environment becomes ever more dynamic. Examine how governance has shifted, explore how boards and leaders are responding to current challenges, and consider pressing trends and issues facing schools today.

Presenter: Debra Wilson began her tenure as president of the National Association of Independent Schools (NAIS) in August 2023. Previously, she served as president of the Southern Association of Independent Schools (SAIS). Her SAIS role followed 19 years at NAIS, as assistant director of regulatory affairs and later as general counsel. She has served on several independent school and educational nonprofit boards and co-authored the *NAIS Trustee Handbook* (10th & 11th editions). Wilson received a BA from Sewanee: The University of the South and a JD from the University of South Carolina.



May 6, 2027 For current & incoming board chairs & heads only.

May 13, 2027 3–4 p.m. CT / 4–5 p.m. ET

Governing with Clarity, Strategy & Purpose: An Orientation for Board Members

Board members' understanding of their purview, role, and expectations—alongside the head of school—directly influences the school's stability and potential. This session supports both seasoned trustees and those new to the role in clarifying how the board articulates, enacts, and celebrates its work. Participants will leave with specific, actionable strategies to govern with clarity, strategy, and purpose.

Presenter: Brooke Carroll, PhD is the principal consultant and coach at Acies Strategies, supporting small schools and nonprofits in leadership development, board development, and strategic thinking and planning. She holds a doctorate in educational psychology and has 30 years of experience leading schools and nonprofits, is an International Coaching Federation-certified leadership coach, and has served on eight boards. Prior to consulting and coaching, she was head of school for nine years at Seneca Academy (MD) and authored *Governing the Small School*.



 *This session will not be recorded.*

May 6, 2027 3–4 p.m. CT / 4–5 p.m. ET

Board Chairs & Heads: Better Together— The Work Beneath the Work

The partnership between the board chair and head of school is one of the most important drivers of a school's success—and one of the least examined in real time. In this session, board chairs and heads are invited to pause and reflect together on their work during the 2026–27 school year: Where were you aligned and effective? Where did you feel out of sync? How did your partnership influence the tone and work of the board and the broader school community? Participants will engage in guided self-reflection, conversation with their partner, and small-group dialogue with peers. If your partner is unable to attend, you are still encouraged to join and will leave with tools and prompts to continue the conversation together; board chairs-elect are welcome.

Presenter: Lynn Wendell has worked as a consultant for more than 150 independent schools and nonprofits. She served as a trustee at three independent schools and as board chair at San Francisco University High School. In addition, she is currently co-chair of the program committee and on the executive committee of Independent Schools Chairpersons Association. She has served on nonprofit boards, board committees, and advisory councils.



Questions? Contact your association directly.