

## Golden Governance

By Dane L. Peters

### Dawson Day School

*“Hi Pat. You all set for tonight’s board meeting?”*

*“For sure. I will give my Head’s Report right after the Committee on Trustees Report, right?”*

*“Yes. Oh, and one other thing, we will have an executive session right at the end, so you will be able to leave sooner. You deserve an early night. You’ve been working so hard to get this capital campaign up and running.”*

*“Executive session? You never mentioned anything about that. Is something wrong?”*

*“No, the board just wants to talk about your performance, and we feel that the dialogue will be more honest and robust if you were not in the room.”*

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### Clarkson Country School

*“Terry, you have a call from the board chair on line 2.”*

*“Hello, Terry. How was your weekend?”*

*“Hi, Chris. I was just thinking that I can’t believe this is my fifteenth year at Clarkson. We’ve seen so much progress in a short period of time. What’s up?”*

*“Terry, I heard at drop-off this morning that Leslie will be leaving after the holiday break. Is that true?”*

*“Oh, yes. I probably should have brought it up last week when we had our weekly meeting.”*

*“Terry, I cannot believe this. Leslie has been with us over 25 years, and is one of our most beloved teachers.”*



So goes the turmoil of our schools when the Golden Rule—sometimes referred to as “the ethic of reciprocity”—is not followed. Simple and, yet, so elusive: “Treat others as you want to be treated.” Over the years, having sat on both sides of the board table—head of school on one

side and trustee/director and board president on the other side, I have become particularly sensitive to a no-surprises relationship that must exist between board chair and head of school if an organization is going to function properly.

This kind of heads-up (no pun intended) communication is critical between the board chair and the leader of an organization, be it not-for-profit or for-profit. A healthy leadership relationship sets up a model of respect and collaboration for the governance and operation of a school. Like the crew on a ship that looks to its captain for a safe voyage, trustees, staff, and parents look to the board chair and head for stability and assurance that all is on course. When the board chair-head relationship is strong, that strength flows to others, so they can present a school culture that includes commitment, confidence, and fostering the mission of the school. Without this kind of culture, how can a school recruit new families, staff, and trustees and fund raise?

Everyday when I send an email to my board chair that has “Heads-up” or “Stand by” in the subject line, I do it knowing that it is essential to keep her advised with a proverbial “FYI” (For Your Information) in the body of the email. At the same time, I know that she will receive the missive, not over react, and call me if she thinks we need to confer. I trust that she will keep me apprised if a similar issue arises at her end, and she will let me know of a potential problem. And, when it is an email that is very sensitive, either one of us might receive an “FYI” and an “FYEO” (For Your Eyes Only) just to make sure we are both on the same page regarding the sensitivity of the issue de jour.

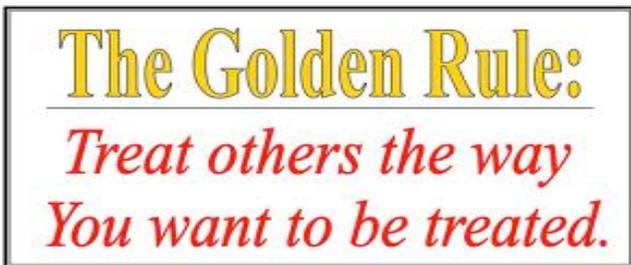
Having read all of Patrick Lencioni’s books (If you have not heard of his work in leadership and management, you must begin that journey. You can find him easily with a quick Google search.), I know that the Golden Rule equally applies to the for-profit world. A good example of this can be found in Walter Isaacson’s bestseller *Steve Jobs*, particularly the part where he points out the tumultuous relationship between Jobs and once CEO John Sculley; you can readily see how this corporate relationship was riddled with mistrust, gamesmanship, and emotionally charged communication between the two powerhouses.

Probably the best way for me to share my years of experience is to pass on a few bullet points on building golden governance that helps lead to healthy board and head of school relationships.

- Absolutely no surprises between the head and board chair!
- Always work towards building trust among school constituencies, especially between the board chair and head of school.
- Constant, regular communication between board chair and head is essential. With email, messaging, and cell phones, there is no excuse for lack of communication.
- Board executive sessions (those that exclude the head) must be logical and anticipated by both the board and head, i.e. discussing head’s compensation, head’s goals, and head’s annual evaluation.
- Use the Committee on Trustees to help manage trustee behavior. This committee can be a good support to the board chair, particularly when it comes to helping best governance practices prevail.
- Make provisions for and insist on succession planning for board leadership.
- The Incumbent Rules:

- It is incumbent upon the board chair and head to use the Executive Committee when sticky situations are beyond their purview.
- It is incumbent upon the board chair to apprise the board as soon as possible when difficult situations arise beyond the scope of the board chair, head, and Executive Committee.
- It is incumbent upon the head to keep the faculty and staff apprised as soon as practical of changes that affect the school.
- Make sure that the head shows appreciation for trustee time and energy, always remembering that they are volunteering their time.
- Make sure that the board shows its appreciation for the work of the head and the staff.
- Keep all sensitive matters relating to governance, operations, and treatment of one another ethical and confidential.
- Let reliable sources like the National Association of Independent Schools, (NAIS), Independent School Chairpersons Association (ISCA), BoardSource, Independent School Management (ISM), state and regional associations, and other experienced heads help you establish best practices for your board and head.
- Absolutely no surprises between the head and board chair!

When the Golden Rule is modeled throughout a school community, everyone in the community benefits, the board chair, head, parents, staff, and especially the students. With the latter, I am reminded of Ted and Nancy Sizer’s seminal book *The Students Are Watching*. Students are very perceptive when it comes to reading adult behavior.



**Golden governance and sensitivity to the needs of others will assuredly result in communications like the following separate email examples:**

*From: Reese, Head of School, The Strong School  
 To: Jordan  
 Subject: Heads-up*

*FYI – I just stepped out of a parent conference with the head of the middle school, two teachers, and the parents of Missy Powers. The parents are loaded for bear and want their daughter changed to a different classroom. When you get a chance, let’s talk so that I can brief you further. Thanks for your good ear.*

*Reese*

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*From: Alexis  
 To: Jamie, Head of School, Healthy Academy*

*Subject: Stand by*

*FYEO – At noon today, I received a phone call from two trustees. I suspect that you can guess who they are. They are apoplectic about your wanting to increase staff salaries by 4%. As they both said, they want to call a meeting of the Finance Committee before Thursday's board meeting and bury you and your off-the-charts spending. Obviously, I told them, that so long as I am board chair they will do no such thing. Let you and me collaborate on how we can move this to a good place. Thanks for that you do to support the faculty and school.*

*Alexis*

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