



INDEX PK-12 Annual Conference

**Hotel Van Zandt
605 Davis Street
Austin, Texas**

Wednesday, October 19, 2022

6:00 – 7:30 pm **Reception for Early Arrivals (Lady Bird Foyer, 2nd floor)**
A casual beer and wine reception for early arrivals. Guests are on their own for dinner.

Thursday, October 20, 2022

7:30 – 8:30 am **Breakfast (Lady Bird Foyer, 2nd floor)**

8:30 - 8:45 am **Convene and Introductions (Lady Bird Ballroom, 2nd floor.)**
The Head and CFO from the same school please sit together

8:45 – 10:30 am **Technical Data Review**
The Head and CFO from the same school please sit together
A thorough review of the Annual Report data inputs and metrics. Please review your Annual Report prior to this session and come prepared with questions.

10:30 - 11:00 am **Break (Lady Bird Foyer)**

11:00 – 12:30 pm **INDEX Data Case Study and Workshop (Lady Bird Ballroom)**
The Head and CFO from the same school please sit together.
Using the INDEX portal, each schools' HOS and CFO will work together to use INDEX data to achieve a better understanding of their school's institutional performance. Please make sure you know your INDEX Portal logins.

12:30 - 1:30 pm **Lunch (Geraldines, 4th floor)**

1:45 - 3:00 pm **Consultancy Dilemmas (Table assignments)**
See description and procedure on following page.

3:00 – 3:15 pm **Break**

3:15 – 4:15 pm **Member Breakouts**
See breakout topics on following pages.

4:15 - 4:30 pm **Day 1 Check-In (Lady Bird Ballroom, 2nd floor)**

6:00 pm **Reception & Dinner (Bangers, 79 Rainey Street)**



Friday, October 21, 2022

7:30 - 8:30 am **Breakfast (Lady Bird Foyer, 2nd floor)**

8:30 - 9:45 am **Consultancy Dilemmas (Continued)**

9:45 - 10:00 am **Break**

10:00 - 11:30 am **Head of School & CFO Breakouts (assigned breakout rooms)**

HOS Breakout Moderators:

- Ken Aldridge, Wilmington Friends School (DE) – Lady Bird Foyer (2nd floor)
- Dale Smith, Isidore Newman School (LA) – Davis Room (1st floor)
- Mike Davis, Colorado Academy (CO) – Red River Room (1st floor)
- Joe Seivold, Berkeley Preparatory School (FL) – Republic Room (2nd floor)

CFO Moderators:

- Caroline Ewing, Key School (MD) – Lady Bird I (2nd floor)
- Lisa Turchan, The Buckley School (CA) – Lady Bird II (2nd floor)
- Teresa Standard, University School of Nashville (TN) – Lady Bird III (2nd floor)
- Bill Auerswald, Greenwich Country Day School (CT) – Lady Bird Studio (2nd floor)

11:30 - 12:00 pm **Wrap-up and Adjourn (Lady Bird Foyer, 2nd floor)**



Consultancy Dilemmas¹

Prior to the conference, each person will write a description of a dilemma related to his/her practice. The description should end with a specific question. This question will help your Consultancy group focus its feedback.

Dilemmas deal with issues with which you are struggling — something that is problematic or has not been as effective as you would like it to be — anything related to your work. Consultancies give presenters an opportunity to tap the expertise in a group, providing respectful, thoughtful, experienced-based responses to your dilemma.

A couple of caveats — Consultancies don't go well when people bring dilemmas that they are well on the way to figuring out themselves, or when they bring a dilemma that involves getting other people to change. To get the most out of this experience, bring something that is still puzzling you about your practice. It is riskier to do, but we guarantee that you will learn more.

All Consultancy dilemmas and conversations will be kept in strict confidence.

Framing Your Dilemma

1. Think about your dilemma.

Dilemmas deal with issues with which you are struggling or that you are unsure about. Some criteria for a dilemma might include:

- Something that is bothering you enough that your thoughts regularly return to the dilemma
- An issue that is not already on its way to being resolved
- An issue that does not depend on getting other people to change (in other words, you can affect the dilemma by changing your practice)
- Something that is important to you, and something you are willing to work on

2. Do some reflective writing about your dilemma. Some questions that might help are:

- Why is this a dilemma for you?
- Why is this dilemma important to you?
- If you could take a snapshot of this dilemma, what would you see?
- What have you done already to try to remedy or manage the dilemma?
- What have been the results of those attempts?
- Who do you hope changes? Who do you hope will take action to resolve this dilemma? If your answer is *not* you, you need to change your focus. You will want to present a dilemma that is about *your* practice, actions, behaviors, beliefs, and assumptions, and *not* someone else's.
- What do you assume to be true about this dilemma, and how have these assumptions influenced your thinking about the dilemma?
- What is your focus question? A focus question summarizes your dilemma and helps focus the feedback.

3. Frame a focus question for your Consultancy group: Put your dilemma into question format.

- Try to pose a question around the dilemma that seems to get to the heart of the matter.
- Remember that the question you pose will guide the Consultancy group in their discussion of the dilemma.

Procedure:

- Each person will write a description and frame a specific question of the dilemma.
- 6 persons will be assigned to each table (consultancy group), with assignments based on attendee title and school size and type (e.g., Heads of PK12 schools with enrollments between 850-950 will be seated together.)
- Two 75-minute consultancies will be run, with 3 consultancies conducted in each round.
- Each person (consultancy) will have 25 minutes.
 - ⇒ Presenter describes his/her dilemma (3 minutes)
 - ⇒ Group asks clarifying questions and develops a shared understanding of the problem (5 minutes)
 - ⇒ Group brainstorms possible solutions (15 minutes)
 - ⇒ Presenter responds (2 minutes)

¹Consultancy dilemmas was developed by the National School Reform Faculty, Harmony Education Center. www.nsrffharmony.org, and the descriptions and procedure above are taken directly from the National School Reform Faculty website.



Member Breakouts – PK-12 Schools

Will the Real Chief Fundraiser Please Stand Up? (Red River Room, 1st floor)

Kevin Yaley, Head of School and Shara Freeman Hoefel, Assistant Head for External Affairs, Francis Parker School (CA)

It's the Head of School. While not every head is born a great fundraiser (much less ever aspiring to be one), each of us possess an abundance of talents and skills that can be leveraged into increasingly effective fundraising strategies. By tapping into our identity, our passion, our interests, and our joy, we can become even more successful and confident fundraisers. In this session we will use stories, media, small group discussions, and digestible lessons, that will help build up our fundraising muscle.

Workshopping Guidelines for Hiring Vendors That Align with School Values (Davis Room, 1st floor)

Jonathan Douglas, CFO, Berwick School (ME) and Gretchen Reed, CFO/Director of Finance, Oregon Episcopal School (OR)

Your school spends millions each year hiring and working with outside vendors such as contractors, suppliers, attorneys, and auditors who might or might not be in alignment with your school's values, particularly in the areas of DEI, sustainability, and governance. Come to this session prepared to share anything your school is doing to evaluate and perpetuate vendors' contributions to the issues your school has chosen to value.

Why Most Strategic Plans Sit on Shelves Collecting Dust: An Interactive Discussion (The Republic, 2nd floor)

Sunny Donenfeld, CFO/Director of Finance, Punahou School (HI)

We'll discuss the differences between good strategy and bad strategy (based on Richard Rumelt's research) and share our experiences with strategic plans that have served our institutions well, and those that have failed.

Comprehensive Site Planning, Construction, and Campaign Execution - Strategies and Lessons Learned (Lady Bird I, 2nd floor)

Molly King, Head of School and Andrea Sabitsana, CFO/Director of Finance, Greenwich Academy (CT)

Greenwich Academy recently completed \$65 million of new building projects over the past three years on time and under budget during the height of the pandemic. This session will discuss strategies and lessons learned from its master plan development, construction, budgeting for the projects, and execution of the associated fundraising campaign.

Learning from a Significant DEI Incident (Lady Bird II, 2nd floor)

Scott Fech, Head of School, Winchester Thurston School (PA) and Bill Hudson, Head of School, Mounds Park Academy (MN)

Both WT and MPA faced a significant challenge to their commitment to Diversity, Equity, and Inclusion in recent years. Bill and Scott will present a case study of a similar situation allowing participants to engage in their own analysis as if they were facing something similar. We will then provide an overview of our learnings from the challenge including changes made to the student handbook, curriculum, crisis communication plans and the implementation of restorative practices. We will also share how we supported the healing of our communities. We will then open for discussion on what other schools are learning from their own DEI challenges.

Navigating Leadership Transition: New Insights from the Research (Lady Bird III, 2nd floor)

Keith Evans, Head of School, Westminster Schools (GA)

The transition to a new leadership role is often a make-or-break interval for leaders and the people and schools they will lead. Yet, like most organizations, independent schools rarely create a clear strategy for transition whether it is occurring in a move between schools or within the same institution. Inevitably, other issues arise downstream and often are not understood as a consequence of a poorly executed transition. In this session we will look at new insights into how to create a plan for this perilous process and increase the chances of longer-term effective leadership.

Strategies for Institutional Change: Getting the Board (and others) on board (Lady Bird Studio, 2nd floor)

Anne Stavney, Head of School and Dan Kelley, CFO, The Blake School (MN)

Since 1974, The Blake School has operated three campuses in southwest Minneapolis. In February 2021, Blake announced that it would unify two of the campuses, bringing all Lower School students together on one campus, and that it will build a new Early Learning Center (ELC) for PK-1. This unification has four benefits: creating an optimal size for the Lower School student body; creating a distinctive early childhood program; building a culture of teacher collaboration; and demonstrating climate leadership. In this session, we will explore the change management strategy we developed to bring the Board, faculty and staff, and families along on this journey and delve into what has gone particularly well and what we wish we had done differently. We will invite participants to share their strategies for large scale institutional change and their lessons learned.