

Candid Advice from the Head of School to the Board Chair

By Jack Hall, CarterBaldwin Executive Search
in collaboration with the Tennessee Association of Independent Schools

As the length of tenure for sitting heads continues to decline, those who care deeply about the future of independent schools are asking what can be done to reverse this trend and bring a renewed stability to our school communities. This question was front and center at the November TAIS Heads' Retreat as Matt Gossage and I facilitated a meaningful discussion with thirty-five TAIS heads about improving the board-head relationship. Not surprisingly, when TAIS Executive Director Sarah Wilson canvassed the heads about topics for the retreat, the board-head relationship was top of mind for heads. We believe it is no coincidence that the Winter NAIS Magazine featured Tekakwitha M. Pernambuco-Wise's article entitled, *What Heads want their Board Chairs to Know*. We realize we are stating the obvious, but the obvious must be stated: the relationship between the board and head is a critical element in extending head tenure.

Using Menti.com to gather thoughtful and anonymous responses, we asked the TAIS heads: **What advice would you give to your board chair to improve the board - head relationship?** The responses were candid, bold, and direct; and we identified several key themes and want to share one important observation.



We realize we are
stating the obvious,
but the obvious
must be stated:

the relationship
between the board
and head is a
critical element in
extending head
tenure.



Be the Chair

First, with respect to the chair's leadership of the board, the key callout was **"Be the Chair."** Heads want the board chair "to make sure all trustees know when to wear their parent hat," "to emphasize the importance of confidentiality and solidarity of the board," and "make sure board members don't move into an operational mindset." Several heads acknowledged that the board chair can best accomplish this by "holding the board to best practices for board governance," "making sure that trustees understand their strategic role," and engaging in "ongoing professional development. Every trustee needs to understand what it means and looks like to serve as a trustee of this school." One head added, "Prioritize governance training! Make sure it is a yearly endeavor that the whole board takes seriously. Be the heavy when a board member steps out of line. Protect the head from the mess." It is clear that heads, as the only employee of the board of trustees, want board chairs to be assertive in leading, training, and re-directing trustees.

Recently, during a conversation with a board chair and head in preparation for a board governance retreat, the head, in his eleventh year as head working with his second board chair, acknowledged that the strong board-head relationship he enjoys is due in large part to the board engaging in governance training every two years. The head shared, "The board chair takes the lead on governance training, and the trustees understand how important it is to be steeped in best practice. We have found it to be important training for the new trustees who have just joined the board, but it also serves to reinforce best practice with existing trustees.

"Prioritize governance training! Make sure it is a yearly endeavor that the whole board takes seriously. Be the heavy when a board member steps out of line. Protect the head from the mess."



As a result, all the trustees understand the board's strategic focus." Interestingly, the board chair acknowledged that two trustees have been asked to step down from the board in the last five years. In each case, it wasn't because the trustee was out of line, it was because the trustee's spouse was trying to take advantage of his/her access to and influence on the board. The board that engages in regular governance training is also best prepared to address problems as they arise, empowering the board chair to "**Be the Chair.**"

Invest in the Relationship

While it is critical that the board chair be assertive in leading, training, and redirecting the board, equally as important is the need to **invest in the relationship** with the head of school. This investment starts with regularly scheduled meetings. The board chair and head must "set aside a specific time to meet, holding regular and scheduled meetings at a minimum of once a month." Unfortunately, this practice is not standard; more than 30% of the TAIS heads shared that they do not have regular, scheduled meetings with their board chair. Not having regular meetings creates a board chair-head partnership based on crisis; meetings occur when there is a problem.

One head acknowledged the importance of "frequent facetime," giving the chair and head time to discuss "what is most challenging that day, week, or month." Much of this time together focuses on the head's professional responsibilities and challenges, but this time together also becomes vitally important support that the



30% of TAIS heads do not have regularly scheduled meetings with the board chair

head can only get from the board chair. One head explained how important it is for the board chair to “work to understand the complexities of the job and what the head of school needs. Sometimes (the chair) is a sounding board and not a ‘fixer.’ Just listen, because I have no one else.” Another head put it this way: “I ask that they understand that they are really the only person who can ask the questions about what support looks like.”

Time together in thoughtful discussion gives the board chair the opportunity to understand what support looks like and how he/she must then advocate for the head with the board as a whole. One head shared, “Spending time with the head of school to understand his or her concerns, goals, and hopes enables the board chair to create guardrails around potential board interference.” This guardianship may take the form of individual conversations with a trustee or may provide the board chair the chance to “be an advocate for the head at board meetings, by sharing the things we discuss weekly.”

Support goes beyond the professional responsibilities of the head. The chair must also, along with individual trustees, “monitor and promote the health, wellbeing, balance and rest of the head.” Unfortunately, a cursory read of almost every head of school job description results in a “24/7/365” expectation, leaving out any room for rest. All too often, boards do not address work-life balance for the head until it is out of balance. One of the generative questions I encourage boards to discuss is “How do you define the concept of rest for the head of school?”

All too often, boards do not address work-life balance for the head until it is out of balance



How does the board define the concept of REST for the head of school?



Board chairs who take the time to invest in the relationship with the head of school with regularly scheduled meetings, proactive support, and advocacy of the head with the trustees and school community will create a professional partnership that is strong. When you combine that professional partnership with a healthy and robust view of work-life balance for the head, the partnership will become both strong and long lasting, as the board chair, head, and board serve and support each other with intentionality.

Goal Setting and Evaluation

The third key theme that the TAIS heads identified centered around the need for regular evaluation and goal setting. Unfortunately, goal setting is not standard procedure. The most recent NAIS Governance Study revealed a decline in the percentage of heads who have annual goals set by the board, from 73% in 2018 to 68% in 2024. This negative trend, undoubtedly influenced by the COVID-19 years, must be reversed. As one TAIS head shared, “Heads really do want honest feedback through regular evaluations and goal setting. These set up clear expectations.”

Clear expectations, in turn, serve the board and head exceptionally well when questions or concerns arise. When a trustee is confronted by a concerned parent or upset alumnus, knowing the clear expectations the board has set for the head allows the trustees to listen to the concern and respond from a position of confidence about the governance and operations model. Rather than being flustered by the concern, trustees are able to reference their strategic work while expressing confidence in the expectations the board has established for the head.

“Heads really do want honest feedback through regular evaluations and goal setting. These set up clear expectations.”



Clear expectations lead to strategic and operational confidence, resulting in reduced stakeholder anxiety. Unclear expectations are far more likely to result in a crisis culture where influence trumps process.

A Striking Observation

We have all heard that the most important relationship the head has is with the board chair. From a governance and operations standpoint, the board chair and head stand out as the two most critical leadership positions in an independent school. Why is it that we can identify a plethora of professional development opportunities for aspiring heads, new heads, and heads (*NAIS Aspiring Heads Program, NAIS New Heads' Institute, SAIS New Heads' Institute, Klingenstein Independent School Leadership Program, Vanderbilt Peabody Independent School Leadership Program, SAIS Heads' Institute, just to name a few*) and yet draw a blank when trying to identify programs that are designed to prepare board chairs for leadership? I always found NAIS Leadership through Partnership to be an incredibly valuable tool for board chairs, but that experience was almost always for current board chairs already serving in the role.

If we want board chairs to be prepared before they step into the role, we must provide meaningful training opportunities, the professional development needs to be geographically accessible (developed by state and regional associations), and such professional development needs to be tied to accreditation. When board chair training is tied to accreditation, professional development opportunities will be established and made available in a way that gives board chairs confidence in carrying out their role with the board, strengthens the board chair - head relationship, and, I believe, will result in longer head of school tenure.



Board Chair Training must be tied to accreditation so that meaningful programs are developed and aspiring chairs participate!



About Jack Hall

Jack's understanding of and affinity for independent K-12 schools are grounded in a lifetime of experience in the space - first as a boarding school student, then as a teacher, coach, administrator, head of school, and trustee. Prior to CarterBaldwin, Jack served as Head of School at The Walker School from 2011-2022, overseeing the school's largest capital campaign and spearheading the creation of the New Avenues Immersive Dyslexia Program.

Jack previously spent twelve years as Head of School for Augusta Preparatory Day School and eleven years as a teacher, coach, and administrator at The Westminster Schools in Atlanta. In addition to his experience teaching, coaching, and leading, Jack served as chair of the Head of School Search Committee and Board Chair at The Stony Brook School, giving him yet another valuable perspective on school leadership and governance.

Jack holds a BA in theatre from Davidson College, an MS in athletic administration from Georgia State University, and an MA in education administration from Columbia University, where he was a Klingenstein Fellow.



If you, your head of school,
or your board are interested in learning more
about independent school board governance,
email Jack at jhall@carterbaldwin.com.

