I always thought of the structure of a school as being like a triangle where the child is in the center, supported around three sides by teachers, parents, and trustees. But who are these trustees? Are they parents? What do they do for parents? Do they work for the head of school? Are they paid? Are they the bottom line when it comes to resolving complaints?

To answer these questions, it helps to understand school corporate structure. Montessori schools are generally classified as public or non-public. Most public schools fall under the jurisdiction of a local school district while non-public schools, which are proprietary (run for profit) or non-profit corporations that are governed by volunteer trustees. Non-profit trustees assume four distinct responsibilities when they accept a position to become a trustee of the corporation: fiduciary, financial, policy-making, and hiring the chief executive officer or head of school. Let me explain each.

Fiduciary Responsibility: Trustees are volunteers who hold the school in trust and must act in the best interest of the school without personal gain. Boards ask their trustees to sign a conflict of interest statement each year to remind trustees of the distinction between personal and professional responsibilities and responsibilities to the school. For example, a trustee who is a current parent is often asked to make decisions in the best interest of the school while some decisions might be contrary to the immediate needs of that parent's child.

Trustees hold the ultimate responsibility for the school. With this responsibility come two peculiar anomalies. First, trustees volunteer their time, invest innumerable hours, and give their financial support to a school—then they have to turn the school over to an individual to run the place. Second, trustees spend numerous hours as chief ambassadors, working and thinking strategically for the school's future, sometimes never being able to enjoy the fruits of their immediate efforts.

Lastly, current parents typically have the most energy to give to a board, but realize that trustee work is often geared to the school's future. Probably one of the most challenging aspects of school boards is the "switching hats" from trustee to current parent that exists in many of our schools. This challenges the board leadership and the school head on a regular basis. Well-established principles of good practice, non-parent perspective, outside resources (see sidebar on governance resources) and constant vigilance all help to keep a board focused on the mission and thinking for the school's future.

Financial Responsibility: While the burden of this responsibility is distributed among a number of trustees, the financial viability of a school does rest with the entire board. This includes making sure outside audits are completed regularly and employee compensation is administered on an equitable basis; being knowledgeable about mortgages and bond issues; setting tuition in a manner that keeps the school operational and does not overburden families; and raising funds that provide for the school's future. Trustees are ultimately responsible for raising funds beyond tuition and ancillary income.

Setting Policy: Beyond the bylaws, which govern the authority and work of the board, policies are established to give guidance to the board and head in the operation of the school. Hiring practices, insurance coverage, budget matters, legal matters, contractual agreements, and financial and audit procedures are areas where policies are established by the board and subsequently implemented by the head of school.
Employ the Head of School: Probably one of the most important and most difficult duties of a school board of trustees is deciding whether to hire or rehire the head of school. To assist in this process, it is common for boards to hire consultants to advise them in choosing a new head of school. Board search committees are often advised by a larger advisory committee made up of teachers, staff, alumni, and parents (current and former). Once someone is hired, it is incumbent upon the board to evaluate the head on an annual basis, set compensation, support the head’s work, and establish annual goals that both the board and head agree upon.

My experiences as a head of two schools, board chair of three different non-profit boards, a trustee of a social service organization, a suburban Montessori school and an urban independent school have helped me see—from both sides—governance as a healthy process in maintaining and building non-profit organizations. In no particular order, it might be useful to delineate some items that typically describe strengths and weaknesses in school governance.

It is imperative that a board learns to take care of itself. A well-established Committee on Trustees should be charged with this care. Good regular self-evaluations, ongoing professional development, thoughtful nominations and leadership succession, thorough new trustee orientations, regular retreats, and a strong committee structure are crucial to healthy boards. The distribution of responsibility to many trustees can sometimes breed complacency, especially when it comes to keeping a board vibrant and well educated.

It is helpful for boards to have an educator from another school to serve as a trustee. Too often, trustees come to a board with little or no experience in education and non-profit governance and attempt to “fit” their career experience and

THE ROLE OF PARENTS IN GOVERNANCE

In her Independent School article, “Everything You Always Wanted to Know About an Independent School Parent, But Were Afraid to Ask,” Michelle Gall is emphatic that independent schools understand what parents want; she cites four imperatives:

1. Parents want you to know their child.
2. Parents want you to more than just show up.
3. Parents don’t want to be surprised.
4. Parents want to do the right thing.

At the same time, here is what parents can do to support the work of trustees:

- Learn all you can about your child’s school through literature, website, teachers and administration.
- Know the mission of the school and become an ambassador of the school.
- Support the school through parent association participation.
- Participate in fundraising activities, especially the annual fund and school-wide events.
- Speak to the classroom teacher first regarding issues relating to your child. If you are not satisfied, then speak to the program/division head and eventually move on to the head of school if necessary. At some point a parent may have to decide that the school is not serving the needs of his/her child and move to another school that can. Don’t look for the quick fix and vent in the school lobby with the first person who happens by.
- Support the school in positive ways by volunteering, spreading goodwill, and investing in the future of the school.
One of the worst mistakes a trustee can make is to begin dealing with staff, undermining the head’s position. This is a recipe for disaster that often occurs when boards are too insular and small.

knowledge into how a school is operated. As an example, trustees who come from the business world struggle to understand how teachers are evaluated and compensated, which is often very different from what they are accustomed to. On the other hand, trustees do bring a wealth of experience to school boards. There is no way my school could have managed a bond refinancing without the guidance and direction of trustees who were financial/investment managers. One of the worst mistakes a trustee can make, however, is to try to impose their style of management on the head or, worse, to step beyond governance and begin dealing with staff, undermining the head’s position. This is a recipe for disaster that often occurs when boards are too insular and small. Boards must have a sufficient number of trustees so that independent committees can work effectively. One of the first things that consultants from Independent School Management, one of the leaders in the industry, tell a client board with trustees from the business community is, “Two thirds of what you know can help make this school even better. One-third of what you know can destroy it. You must not approach a school with the same mentality you approach a business.” Their point is that a school does not produce Education as a product. A Montessori school is a community that nurtures each child. There is a cost in customizing the education to fit the needs of the child, a cost in supplies, staff and emotional commitment that does not function effectively under the general business practice of creating cubicles to fill with staff viewed as commodities. Choosing new trustees is one of the most important functions of a board. Here is what NAIS president Pat Bassett has to say about trustee selection: “We used to say that we wanted trustees who could bring two of the three Ws: work, wisdom, and wealth. The problem was that when it came time to raise serious money, too many trustees thought, ‘Thank God they wanted me for my work and my wisdom.’ So now we look for trustees who can bring us the 3 Rs (and we expect all three of them): raising image, raising students, and raising money.” Taking care to ensure balance in trustee membership is essential. A board composed of current parents, alumni, alumni parent, community members, and an outside educator will provide the best perspective when it comes to establishing a vision that works for the present and looks forward to the school’s future.

Often one or two trustees can disrupt the work of a board. While conflict within a board is healthy, power struggles, personal agendas, and personality clashes can be destructive and erode the morale of a board, the head, and a school. Board leadership must be ever vigilant in this area. One of the reasons that schools go through the turmoil of change because a popular and successful head does not have his or her contract renewed is usually due to the fact that someone on the board has a different agenda, not that the head has not been an effective leader and academic meeting the goals of the board.

It is not a good practice to have spouses sit on a school board or to have trustees who are related to an employee. This practice can erode trust within a school community. Inherent in the word trustee is “trust”—a trust on which the head and school community can rely.

John Carver, a well known author on governance, has a model—The Design of the Partnership—that is a clear example of how boards and heads share the decision-making process. A clear understanding of what decisions the board makes, what decisions the head makes, and what decisions are shared makes for better management of the mission, vision and operation of the school. This becomes critical when a crisis arises, such as allegations of teacher misconduct, or an upset parent because the school has reported parent abuse, or an accident where a child is severely injured, or school funds are mishandled.

Trustees are often selected because of their ability to get things done; also, schools are naturally service-oriented “businesses.” When parents or teachers bring a complaint to a board member, they must be redirected to the head of school. The operation of the school, which includes admissions, employment decisions, curriculum, and parents association matters, falls under the responsibility of the head of school.

Where a child is placed in preschool, or if a child is dismissed from school, or a family struggles to make tuition payments, or a teacher is not given a raise—these are not board matters. They are operational and must be left to the head and her/his staff.

Trustees who are current parents are ever-present at school, dropping off/picking up their children. “Popping in” to see a staff member while at school to ask about or listen to school issues is detrimental to the operation of the school, undermines the head of school, and confuses teachers and parents. Micromanagement of the leadership of a school by trustees is endemic in our schools and leads to low head of school tenure and irreversible community polarization and dissention. Board members who come from the business community and are used to taking leadership positions have a hard time understanding the importance of checking their egos and their impulse to manage the organization at the door. The trustees management responsibility ends at ensuring the board hires a head who can accomplish the mission of the school while they focus on the future.

It is important that the leadership of the school—board chair, head of school, board executive committee and administration—agree and understand the roles trustees, teachers, parents, and administration play in the overall structure of a school. Blurring and overlapping of roles and responsibilities confuse everyone and hinder progress and community building.

Even though their work is behind the scenes, trustees play an integral role in the success of a school. They are a key part of that triangle formed along with parents and teachers —with the student in the middle. The triangle might even be considered the shape of trust, and shaping trust must come from teachers and trustees so that parents can feel value and comfort and return their trust in their school.