INDEPENDENT SCHOOL GOVERNANCE AND LEADERSHIP DURING COVID-19

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EXECUTIVE SUMMARY

All organizations, including Independent Schools, must follow specific state and federal mandates. However, political pandemic responses varied widely regionally, leaving Independent Schools with the flexibility to design their community's response. This freedom was both liberating and taxing on school leaders and governance structures. Members of the National Association of Independent Schools (NAIS) are bound by an accreditation practice separate from the public school governance and state requirements. These schools design their mission statements, curricular standards, and hiring protocols (Gilmore and Rush, 2012).

When COVID-19 appeared in the United States, all schools, including NAIS schools, redirected their efforts towards online, distance, and hybrid protocols. This incredible re-imagining of school protocol and practices placed unprecedented demands on school leadership and governance structures. To this end, NAIS, in partnership with Vanderbilt University's Peabody College of Education, charged researchers with exploring the competencies, qualities, and characteristics of leadership and governance structures in member schools during the COVID-19 pandemic.

Researchers, through a mixed-methods approach, gathered data exploring the practices of governance structures and Board Chairs; partnership and quality of dialogue between school Heads and their Board Chairs; competencies, training, and experiences that prepared school leadership for the COVID-19 pandemic; and how did the COVID-19 pandemic further inform the previous literature on Head of School isolation and increasing demand of the role.

 Most respondents identified a positive relationship with their Head of School or Board Chair. This partnership and increase in regular communication, on the whole, proved essential for NAIS schools to engage these circumstances with confidence and community support. The COVID-19 pandemic has prompted a more extensive dialogue about role expectations and clarity, regular institutional and governance training opportunities, and crisis preparedness.

Qualitative and quantitative research provided additional insight into the demands and evolving expectations placed on school Heads. Previous research suggested increasing reports of isolation, burnout, and a sense of unsustainable responsibility. This study affirmed this assertion. The COVID-19 pandemic continued to expose and accelerate the sentiment among many Heads of School that the role's demands and expectations are untenable.

This research suggests that continued or increased training for boards of trust would continue to prepare governance bodies and chairs with the skills necessary to adequately support the institution's Head of School and fiduciary needs. As role boundaries continue to be a reported concern of school leaders, there is strong evidence that training and transparency keep all parties in their appointed tasks during pre-crisis and times of crisis.

Cultivating, establishing, and maintaining relationships with peer institutions proves to benefit school Heads as they navigate increasing demands and unprecedented circumstances. Engaging these networks is important to address feelings of isolation. NAIS supports these networks to an extent, but a more formal institution connecting career colleagues would benefit the larger community.

INTRODUCTION

In partnership with The National Association of Independent Schools (NAIS), our research discusses how and if the COVID-19 pandemic impacted and informed the working relationship between institutional leadership and Independent Schools' governance structures. NAIS, formed on March 1, 1962, is the membership institution that unifies over 1,600 member schools by providing information detailing best practices, literature and publications, mentorship and training programs, and national conferences.

NAIS has conducted substantial research on the partnership between the Head of School and the Board of Trustees at various member schools. Continued research demonstrates more essential questions regarding the future of Headship and the impact Boards have on this position. Leaders of school face myriad challenges and obstacles have emerged as a result of the COVID-19 pandemic. As the business of school becomes more complicated in the current global climate, the leadership and governance structures within NAIS institutions require clear roles, expectations, and aligned goals and protocols (Balzano, 2020; Juhel, 2016).

More than ever, leadership and governance entities will have to innovate, think creatively, and exhibit resilience, among other competencies and qualities. Before the COVID-19 pandemic, many NAIS Heads of School identified the governance structure and relationship as an area of uncertainty and growth opportunities during their tenure (Juhel, 2016). Additionally, Board Chairs expressed a need to trust the expertise and insight of their head regarding the needs of teachers, students, and parents so as not to overstep the bounds of their role. (Balzano, 2020; Batiste and Riven, 2011). The challenges and strengths of this relationship have been tested and highlighted during this time of unprecedented uncertainty.

The purpose of this capstone is to discuss and inform the leadership and governance competencies and practices that best serve NAIS member schools during the COVID-19 global pandemic. This research aims to communicate meaningful and applicable crisis management protocols, Board of Trustee and Head of School training opportunities, and clarity for leadership and governance roles that will most meaningfully sustain institutions.

NAIS was formally established on March 1, 1962, when delegates from the Independent Schools Education Board (ISEB) and the National Council of Independent Schools (NCIS) merged. Francis "Torch" Parkman, who had been president of NCIS and former head of St. Mark's School in Southborough, Massachusetts, served as the first President. Quickly, member school numbers climbed from 660 to over 1,600. The Vision Statement for NAIS reads as follows: "All learners find pathways to success through the independence, innovation, and diversity of our schools, creating a more equitable world." Mission Statement: "As the largest association of independent schools, NAIS co-creates the future of education by uniting and empowering our community. We do this through thought leadership, research, creation and curation of resources, and direct collaboration with education leaders." Finally, NAIS highlights the following values: thinking independently, leading change; embracing diversity; championing inclusivity; and empowering the community (NAIS, 2020).

NAIS member schools are non-profit institutions that are governed by a Board of Trustees and, usually, managed by a Head of School. The pandemic has drastically altered the way that most independent schools have operated. Many schools adopted a distance learning model for the spring of the 2019-20 academic year, with extensive planning for fall opening taking place over the summer of 2020. Considerable adjustments to school schedules, procurement and use of new technology, modifications to classrooms and the physical plant, professional development for faculty and staff, and increased expenses related to health and sanitation represent essential factors that emerged in quantitative and qualitative data. Additionally, many NAIS schools were dependent on their states to determine if they could host students on campus and in what capacity.

The routine delivery of the school's academic and co-curricular programs the school is contractually obligated to provide is of paramount concern. In concert with increased online delivery of curriculum and programs, the impact of these modifications could have long-term ramifications for the independent school model rooted in a comprehensive on-campus experience.

Considerable research exists around feelings of isolation among school leaders in both public and independent schools. The job of Head of School is complex and demanding. NAIS schools are heavily tuition-dependent and exist in highly competitive marketplaces. Tuition costs have far outpaced the rate of inflation and cost of living increases, and many parents, including Millennials and others, approach independent schools with a consumer's mindset - they want to see value-added for their children; in other words, simply put, they want to see what they are getting for their money, especially as independent school tuition becomes a larger and larger portion of their income. It can be argued that, at least at independent schools, education has to some extent become commoditized. In sum, the job of Head of School has changed dramatically during the past 10 to 15 years, and, again, it is often a taxing and stressful position. The idealized image of an independent school Head of School that we see in popular culture or that, more importantly, Heads envision when they accept the job, may no longer exist.

ORGANIZATIONAL CONTEXT cont.

For example, NAIS Research in 2020 found that the average tenure of a Head of School is decreasing and is now around 7 years. It is critical to consider the impact of the pandemic not only on the potential tenures of Heads of School, as consistency in leadership - with exceptions - generally correlates to a healthier school in every respect, but also on[CMA1] the personal and professional lives of school Heads and on the willingness of potential future Heads of School to take on the position.

This research's primary stakeholders are NAIS, Heads of School, Board Chairs, and Boards of Trustees. Secondary stakeholders include independent school faculty and staff, students, parents, and alumni. This research hopes to inform crisis management and professional partnership training and preparation protocols for school Heads and Board Chairs. This capstone will ideally prove useful as schools continue to grapple with the pandemic and its long-lasting impacts during the coming years. Lessons learned may also be practical for addressing unknown crises in the future, just as the financial crisis of 2008, for example, has shaped NAIS's understanding of the current crisis. Given the parameters outlined above, this study is an independent, formative evaluation designed to help NAIS, Heads of School, and Board Chairs improve their practice.

AREA OF INQUIRY

The behaviors, understandings, and partnership practices that exist during the pre-crisis phase often set the tone for how governance and leadership structures respond to unpredictable and uncertain events. The most recent NAIS governance study in 2018 identified this partnership as a contributor to school success and growth. Respondents also reported opportunities for Boards and Heads to have more meaningful conversations, identify and clarify role boundaries, and meaningfully work together towards shared goals (Torres, 2020).

AREA OF INQUIRY cont.

Reports of Head of School isolation, burnout, and frustration with the role have increased, with many identifying the job description as untenable (Stephenson & Bauer, 2010; Casper et al., 2016). The Head of School role is also rapidly evolving, shifting quickly from a master teacher to a school CEO. Before the COVID-19 pandemic, NAIS identified an increasing Head of School turnover, with 21% of school Heads replacing a predecessor who served for three years or fewer. NAIS schools are heavily tuition-dependent and exist in highly competitive marketplaces. Tuition costs have far outpaced the rate of inflation and cost of living increases, and many parents, including Millennials and others, approach independent schools with a consumer's mindset - they want to see value-added for their children; in other words, simply put, they want to see what they are getting for their money, especially as independent school tuition becomes a larger and larger portion of their income. It can be argued that, at least at independent schools, education has to some extent become commoditized. The relationship with Board Chairs could potentially have a relationship with this turnover. This research, conducted in partnership with the University of Pennsylvania Graduate School of Education, indicated a disconnect between Heads of Schools, Board Chairs, and Board Members' understanding of role responsibilities and boundaries (NAIS Head Turnover at Independent Schools, 2020).

NAIS's ongoing literature and training have identified the importance of shared vision, open communication, and clear roles in school leadership and governance structures. When crises arise, institutions and personnel naturally look to the organization's most senior members, school Heads, and Board Chairs to guide and manage the school's responses to unforeseen events (McGovern, 2020; Davis, 2020). As an organization, NAIS was aware of the strain on Heads of Schools, Board Chairs, governance bodies, and their partnership before the COVID-19 pandemic, with over 40% of Heads and 30% of Boards reporting a strain in their relationship over the past decade (NAIS Head Turnover at Independent Schools, 2020).

The communication between the Head of School and the board chair is critical and often shapes the institution's philosophical direction, practices, and behavior. While the school's leadership and governance are distinct jobs with different responsibilities, their roles and responsibilities are intertwined. When the system works well, the two entities can operate as symbiotic partners with balance and precision. When the relationship is strained or roles are left unclarified, opportunities are missed and can negatively impact communications, operations, and institutional well-being (Balzano, 2020).

Like the COVID-19 pandemic, Black Swan events can be devastating to a school community, expose or exacerbate pre-crisis challenges or poor practices, and blur the lines of governance and leadership roles (Hulbert & Hulbert, 2020). Through extensive quantitative and qualitative research and reporting, NAIS identifies that the COVID-19 pandemic would inform, accelerate, and expose positive and negative crisis management responses, frameworks for leadership and governing partnerships, competencies for effective leadership, and institutional innovation.

LITERATURE REVIEW

GOVERNANCE

NAIS and other independent school organizations have produced robust literature on both trends and best practices in independent school governance. Board composition, recruitment and orientation of members, assessment of Board performance, Board and committee structures, strategic planning, and the relationship with the Head of School have been consistent attention and analysis areas. Although independent schools vary significantly in their character and mission, independent school Boards' roles and responsibilities are consistent.

Former NAIS president, Pat Bassett, noted in his "Trusteeship 101" presentation that an independent school Board's work is broken down into three levels: fiduciary, strategic, and generative (Bassett, 2001). Serving and Accrediting Independent Schools (SAIS) expands upon these three responsibilities by identifying six fundamental characteristics of highly effective independent school Boards: they are mission-focused; they distinguish their role in governance from operations understanding that they have one employee - the Head of School; they think strategically instead of tactically; they represent the school well to the broader community; they maintain confidentiality; they operate efficiently with clearly defined roles and committee structures (SAIS - Overview of Effective Boards, 2019). Additional pre-pandemic governance literature published by NAIS communicate and detail best practices and possible challenges for Independent Schools. NAIS' Trustee Handbook 10th Edition communicates suggested guidelines for board composition, bylaws, meeting schedules, Board training, committee organization, and appointment processes. NAIS' Board Chair Handbook: An Essential Guide for Board Leaders in Independent Schools, details communication strategies, leadership competencies, and recommendations for professional partnership with the Head of School.

Dr. William Mott's Super Boards: How Inspired, Governance Transforms Your Organization, and Dr. Richard Chait's Improving the Performance of Governing Boards detail and discuss appropriate and productive independent school governance structures using self-conducted research or research-based findings. Additionally, this literature is complimented by the research of nonprofit governance in other occupational sectors. An extensive study of nonprofit governance similarly identified six characteristics of effective Boards: understands institutional context; builds learning capacity; nurtures the Board's development as a group; recognizes complexities and nuances; respects and guards the integrity of the governance process; and envisions and shapes institutional direction (Holland et al., 1989).

The research and practices of independent school and nonprofit governance is based on the premise that well-performing Boards coincide with well-performing organizations (Brown, 2005). However, measuring Board governance's actual effectiveness remains a challenge as the analysis is almost entirely based on subjective individual experience and anecdotal evidence (Jackson & Holland, 1998). Furthermore, there is significant variance in how Boards interpret their roles and contributions to the running of their organizations (Cornforth & Edwards, 1999). To address these challenges and recommend best governance practices, researchers have developed various means to assess Board performance empirically. The Board Self-Assessment Questionnaire (BSAQ) in Jackson & Holland (1998) introduces frameworks rooted in the different theoretical perspectives that drive Board relationships with their organizations. Many other models utilize a mixed-method approach that specifically targets one or more effective Board competencies (Brown, 2005; Brown, 2007; Cornforth & Edwards, 1999; Holland et al., 1989) all represent research-developed approaches for understanding the impact of Board governance practices.

A study of nonprofit organizations in South Carolina, a state where nonprofit growth has outpaced the sector nationally, identifies six "best practices" of effective Boards: Board involvement in fundraising, policy setting, program, and services evaluation, hiring and evaluating the executive director, new Board member recruitment, and serving as an ambassador to the community. It also highlights three practices that effective Boards avoid: day-to-day management, budget preparation, and program development (Zimmermann & Stevens, 2008).

To analyze trends and growth of Board leadership specific to independent schools, NAIS has conducted a series of extensive governance studies in 2006, 2012, and most recently in 2018. Research Insights: Findings from the Latest NAIS Governance Study (Torres, 2020) represented a strong response rate of 468 Heads of School and 393 Board Chairs participating in the survey. The study identified key insights relative to relationships and culture, Board performance, Board composition, committees and policy, member and chair terms, recruitment and orientation, and executive Board sessions. Some key takeaways include that eight in ten Heads of School reported having very or extremely strong and highly functioning relationships with their Board Chairs, but noted that Board Chairs tended to have a more positive view of Board culture than their Heads. "Ensuring the financial sustainability of the school" and "thinking strategically as a Board" were the two highest-rated responsibilities of the Board according to Heads of School and Board Chairs, and parents still accounted for almost half of Board members (Torres, 2020).

Studies of non-profit governance also identify an emerging governance trend in public benefit nonprofit organizations with government grants or contracts: the employment of volunteer advisory groups. These groups are formed to complement Boards and administrative staff's typical governing structure by providing expertise and targeted contributions to primary organizational activities and environmental relations. Advisory groups enhance governance capacity and foster external relationships without undermining the strengths of current Board leadership (Saidel, 1998). Although these studies tend to focus on a particular nonprofit management sector, researchers advocate the benefits of employing advisory groups to a broader nonprofit audience.

The literature review of independent school and non-profit Board governance provides several key insights that inform our study:

- Effective Boards "stay in their governance lane" and entrust the organization's operational management to the chief executive and leadership team.
- Effective Boards think strategically and adopt a long-term view of their work.
- Effective Boards engage in regular training, self-evaluation, and generative thinking.
- Effective Board members represent the organization and foster connections with the broader community.
- Volunteer advisory groups can enhance Board governance capacity and external relationships.

COVID-19 LITERATURE AND CRISIS MANAGEMENT

The outbreak of the Covid-19 pandemic resulted in an abrupt shutdown and transition to online learning for most independent schools. As researchers began to assess the impact of this severe disruption on the nation's education system, NAIS moved quickly to provide guidance specific to independent school governance. In April 2020, NAIS suggested five areas of Board focus: take care of the Head of School; continue strategic and generative thinking; solve the right problem; rethink fundraising; take care of yourself (Davis, 2020). A month later, the President of NAIS, Donna Orem, provided additional guidance for Boards by imploring them to work with discipline, focus on both short- and long-term decisions, and temporarily adopt new committee structures to operate more efficiently in response to the pandemic (Orem, 2020). By summertime, NAIS literature was making the connection between pandemic-era governance and crisis management. Noting that crisis management does not begin with a crisis, NAIS encouraged Boards to be more intentional in planning for pandemic response and other contingencies (Hulbert & Hulbert, 2020).
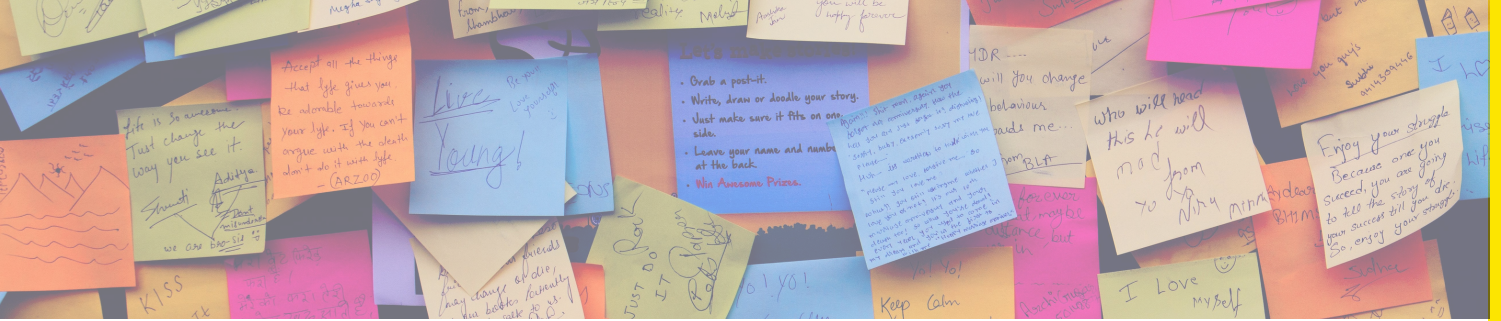
To assist those efforts, NAIS published Education Unknown: A guide to scenario planning for Independent Schools in the age of COVID-19, which outlines financial, structural, and academic approaches for various frameworks in response to the global pandemic. This publication identifies three distinct paths independent schools will engage in their future planning: Continuity - schools will work to resume the practices and processes utilized before the pandemic; Evolution - schools will incorporate some of the positive aspects, and best lessons institutionally learned during this time; Transformation - schools will fundamentally change their vision and plans for the future.

Additionally, it encourages Board and school leadership to engage in scenario planning, keeping three principles in mind: preserve community, confront reality, communicate and collaborate. (Orem et al., 2020) Encouraging Boards to engage in regular crisis management training is further supported by pre-pandemic research of school crisis management. Given the high level of uncertainty embedded in schools' daily lives and the increasing speed and complexity with which crises evolve in the digital era, governing bodies should assume a continuous pre-crisis posture and conduct regular training accordingly (Liou, 2015; Peterson, 2001).

As the Covid-19 pandemic unfolded, researchers were quick to try and ascertain the impact of school shutdowns, the transition to online learning, and the ramifications of both on student development. A significant focus of the early literature was devoted to highlighting learning loss, the socioeconomic and racial disparities relative to educational access, and the effectiveness of online schooling (Dorn et al., 2020; Tucker, 2020; Huber & Helm, 2020). The National Center for Research on Education Access and Choice published one of the first comprehensive studies on how America's schools have responded to the pandemic. In their report How America's Schools Responded to the COVID Crisis, researchers from Tulane University "describe the extent to which schools provided personalized and engaging education and a wide range of service in response to the COVID-19 crisis." (Harris et al., 2020) Primarily using school websites, different schools were assessed for different types of information like approaches to instruction, grading and assessment, equity of access and support, and access to additional services like lunches and counseling. Their findings demonstrate a strong focus on academic instruction to general education students with the demographics of families and, specifically, parents' educational achievement, serving as the strongest predictor of student success. The geographic findings reflected a delayed response in southern states, with traditional public schools embracing online learning more slowly than their charter and private counterparts. Their findings indicate a strong relationship between affluent communities and minimal disruption to academic programming. (Harris et al., 2020).

In April 2020, NAIS began to administer regular COVID-19 snapshot surveys every other week to understand further and disseminate school response trends. These surveys also serve as a strong pulse for understanding the movements, behaviors, and tendencies during this rapidly unfolding situation. This survey asks a specific and relevant question every other week to support collective understanding with a high response rate. An example of this snapshot survey data is the Reopening and Tuition Plans survey administered the week of July 27. This snapshot indicates that 40% of NAIS member schools planned to open in Fall 2020 with in-person learning, 41% plan a hybrid opening model, and 19% plan a distance learning model. Snapshot survey topics range from Tuition Reimbursement, Academic Approaches, and Fundraising Reports.

Another interesting finding from early studies of the impact of COVID-19 is the increasing trend in cooperation among corporate entities. The dramatic nature of the economic shutdown induced increased collaboration and cooperation between previously competing businesses. This simultaneous cooperation and competition are dubbed "coopetition." Examples of increased business-to-business collaboration amongst industry competitors were noted in retailers sharing information about stock levels, pharmaceutical organizations working together to develop a vaccine, tech giants collaborating for the greater good, and charities forming alliances to serve joint causes (Crick & Crick, 2020). A similar trend has been observed in higher education. A survey of college business officers in the summer of 2020 found that 19% considered sharing administrative operations with another institution in order to lessen the financial impact of COVID-19 (Lederman, 2020).

The review of the early literature on pandemic response and governance during crises provides several key insights that inform our study:

- Pandemic response in independent schools evolved over three distinct phases: shutdown and transition to online learning (March-May/June); scenario planning for how to operate in the 2020-2021 school year (May/June-August/September); Execution of plans and protocols in the 2020-2021 school year (August/September - present).
- Pandemic response required increased collaboration between the Board and school leadership to plan strategically, manage school finances, and leverage expertise outside of the school to develop protocols and policies.
- Independent schools enjoyed the resources and flexibility to facilitate a smooth transition to online learning relative to public schools.
- Governance response to the pandemic highlighted the need for ongoing training in crisis response and management.
- The pandemic increased opportunities for "coopetition" between regional independent schools.
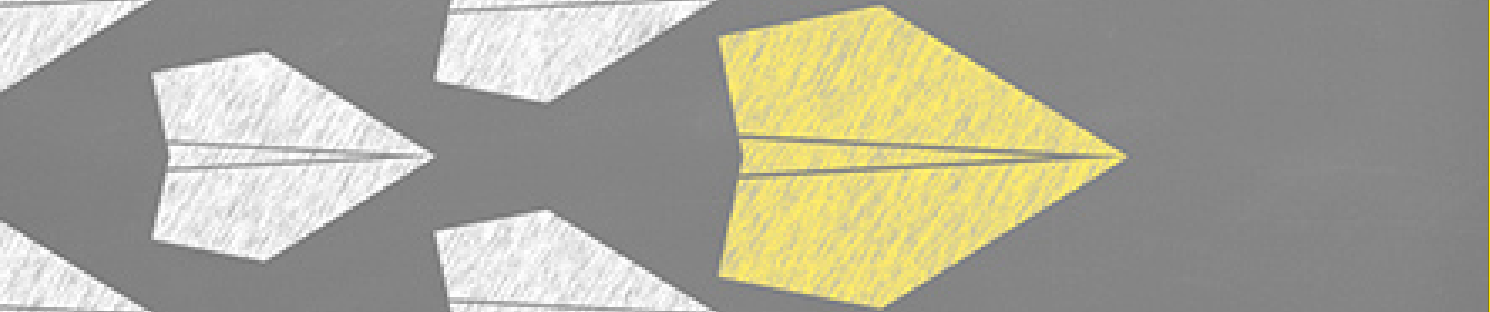
HEAD OF SCHOOL

Throughout the past several decades, the role of an independent school head has evolved from a "lead" teacher to serving as the chief executive officer (Torres et al., 2020). Increased time with the Board of Trustees; continuous fundraising activity; meeting the evolving expectations of "consumer" parents; the necessity for greater external promotion and marketing activities; managing facilities; safety and security; and addressing near-constant legal concerns all represent areas of increased demand that have the Head of School focused more on institutional health and fiscal responsibility than educational matters (Griffin, 1999). The job of Head of School has become more complicated and can be overwhelming. The role has become increasingly isolated, the workload is untenable, and it is getting harder for Heads of School to sustain their energy and focus (Wickenden, 2011). According to NAIS, more than 20% of new school Heads in the 2019-2020 school year follow predecessors who left after three years or less, increasing 14% from 2015-2016 (Torres et al., 2020). Research on the evolving demands on public school principals also notes that reducing principals' workload and providing them with social supports are crucial to avoiding burnout (Stephenson & Bauer, 2010).

Concerning governance, the Head of School is responsible to the Board of Trustees for all facets of the school's operation. SAIS encourages the Board to consider the Head of School as their only trustee (SAIS - Overview of Effective Boards, 2019). Therefore, the communication between the Head of School and the Board chair is critical and often shapes the institution's philosophical direction, practices, and behavior. While the school's leadership and governance are distinct jobs with different responsibilities, their roles and responsibilities are intertwined. When the system works well, governance and leadership structures empower institutions to effectively mobilize and innovate. When the partnership is challenging, the institution as a whole can be negatively impacted (Balzano, 2020).

The Board's primary job is hiring the Head of School and ensuring the institution's financial health and budgetary operations (Torres, 2020). Heads are responsible for ensuring mission-aligned programming and practices for administration, teachers, employees, students, parents, and alumni (Batiste and Riven, 2011).

NAIS has conducted a substantial amount of research on the relationship between the Head of School and the Board of Trustees at various member schools. NAIS is especially interested in the future of headship, and the impact Boards have on this position. School leaders face myriad challenges and obstacles that have emerged as a result of current circumstances. As the business of school becomes more complicated in the current global climate, the leadership and governance structures within institutions will require clear roles, expectations, and aligned and collaboratively defined goals (Balzano, 2020).

More than ever, Heads of School will have to innovate, think creatively, and exhibit resilience, among other competencies and qualities. Before the COVID-19 pandemic, many NAIS Heads of School identified the governance structure and relationship as an area of uncertainty and opportunity for growth during their tenure (Juhel, 2016). Additionally, Board Chairs need to trust their head's expertise and insight regarding the needs of teachers, students, and parents so as not to overstep the bounds of their role. (Balzano, 2020). The challenges and strengths of this relationship have been tested and highlighted during this time of unprecedented uncertainty.

The 2010 Principal Isolation Survey conducted by former colleagues at George Mason University assessed the relationships between isolation in predicting emotional, cognitive, and physical burnout among principles and how isolation impacts their work life. Role ambiguity, social support, coaching, and role overload were all strong predictors of reported feelings of isolation. Interestingly, coaching, which has theorized to offer support and decrease feelings of isolation, actually prompted higher reports of community withdrawal. These findings prompt interesting questions for Boards, principal/Head of School onboarding and training, and organizational structure approaches. The isolation reflects a sense of separation from their peers both in their school and from those who share a similar posting at other schools. Additionally, this study suggests an assessment of the amount of work placed on school leaders.

The 2018 NAIS study: *Head Turnover at Independent Schools: Sustaining School Leadership* was conducted by the University of Pennsylvania. This study found a relationship between head of the school turnover and the working rapport with the Board of Trustees, specifically, the Board chair. A tense dynamic was not uncommon, with 42% of Heads and about 33% of Boards reporting a strained Head-Board relationship in the past ten years. Additionally, this study identified that about a third of Heads did not believe that their Boards operate within their role boundaries, compared to 20% of Board members and 15% of Board Chairs. The Head Turnover study also sheds light on challenges with training, Board member selection, and onboarding of governance members.

The Head's Handbook: A Guide for Aspiring, New, and Experienced Heads of School outlines and details individuals' expectations in this role. This handbook identifies that the position of the school head has grown increasingly more complex. NAIS has created this handbook for new and experienced school leaders to navigate this evolving and challenging role. Specific topics and questions are: How can Heads cope with and master the many responsibilities of headships these days? How do Heads successfully deal with crises? How do they best cultivate relationships with the community? This handbook, in partnership with the NAIS 2017 Survey of New Heads of School Report, dissertations like Casper et. al, "The Role of the Independent School Head of School" (2016), and articles like Juhel's, Leading and Managing Today's Independent School: A Qualitative Analysis of the Skills and Practices of Experience Heads of Independent Schools in the New York Area (2016), will frame the expectations and challenges confronting independent school Heads prior the COVID-19 pandemic.

A review of the relevant literature of the role of an independent Head of School provides several key insights that inform our study:

- The role of Head of School has become increasingly complex and reflects the work of a chief executive officer.
- The workload and expectations of independent school Heads have increased dramatically leading to increased isolation and burnout.
- The relationship between the Board Chair and the Head of School plays a critical role in determining the effectiveness of school governance and climate. The unique challenges posed by the pandemic highlighted the importance of this relationship.

CONCEPTUAL FRAMEWORKS

Identifying the nuance and breadth of respondents' experiences represented in NAIS's research goals and questions, researchers worked to cultivate conceptual frameworks that would identify the concepts that would inform and advance understandings in the most comprehensive capacity. Looking at the research questions through the lens of previous literature and research was essential to understand how the unprecedented events of the COVID-19 pandemic shaped institutional responses, challenges, successes, and future practices. Additionally, understanding pre-pandemic protocols and competencies were equally important to explore what did and did not effectively serve schools as they navigated this event.

Understanding the governance and leadership practices utilized by NAIS schools before and pandemic was essential to frame the preparedness, habits, and cultural understandings of institutions. The conceptual framework of Governance and Leadership Practices During COVID-19 included Board characteristics, crisis management protocols, Board behaviors, professional practice, and institutionally identified challenges and successes. This conceptual framework, through appropriately crafted questions, offered a natural point of comparison of "before" and "after." When respondents identified practices, they often would reflect on if these were behaviors that existed prior to the pandemic that continued to serve their mission or newly adopted crisis-specific competencies that they responsively identified.

Previous literature on Governance and Leadership Practices During COVID-19 did not exist in abundance prior to this research. Researchers built off of previous studies and frameworks of best practices. Previously administered NAIS Governance and Leadership reports served as the most useful guide as they framed the pre-pandemic understandings and training specific to Independent Schools. Most notably, the 2018 Governance Study published by Torres (2020), Thomas P. Holland, Richard P. Chait and Barbara E. Taylor's seminal work Board Effectiveness: Identifying and Measuring Trustee Competencies (1989), and NAIS's The Head's Handbook by Gene Batiste and Jay Riven (2019) informed researchers understanding of key terms, utilized variables, and institutionally shared understandings.

Understandings how these practices and behaviors influence and inform the partnership between Heads and Boards is a primary focus of this research. The conceptual framework Governance and Leadership Partnership During COVID-19 included discussion and inquiry focused on communication frequency, shared vision for the response, and overall working relationship. This framework also lends important insight into comparative responses. Heads and Board Chairs often framed answers regarding their partnership during the pandemic compared to their pre-pandemic habits and behaviors. This supported continued understanding of what practices were sustaining and beneficial as schools engaged in crisis management protocols.

Literature that informed the essential nature of this partnership included specific sections of NAIS's Sustaining Leadership: New Head Turnover Research complied by Torres et al. (2020), Baker, Campbell, and Ostroff's (2016) Independent School Leadership: Heads, Boards, and Strategic Thinking, and Balzano's (2020) podcast interview with Richard Chait. These qualitative and quantitative pieces emphasized the importance of a productive partnership between leadership and governance entities in Independent Schools. The insights provided in this literature strongly connected the importance of the partnership with overall head satisfaction and retention.

Research and literature exploring the Independent School Head of School role depicted an increasing sense of isolation and burnout. Interviews and surveys indicated that Heads viewed the role as ever-increasing and untenable. The Conceptual Framework COVID-19 Impact on Head of School Role focused on aspects such as isolation, peer relationships, job satisfaction, and evolving expectations within the role. Specifically utilizing the 2010 Principal Isolation Survey crafted by colleagues at George Mason University, this framework was focused only on Heads of School and their experiences.

RESEARCH QUESTIONS

In consultation with NAIS, and building on their existing body of literature and research, the following questions framed this study:

- How have governance systems and leadership roles been informed by the COVID-19 pandemic?
- How did the collective Independent School response to the pandemic affect governance practices, specifically the roles and responsibilities of Heads of School and Boards of Trustees?
- What factors (e.g., training, experience, outside interventions/programs) impact resiliency among leaders - that is, Heads of School - during this time?
- Before the pandemic, how were issues of isolation experienced by Heads? How have those feelings changed or been magnified during this crisis?

PROJECT DESIGN AND DATA

The questions posed in this research are challenging to quantify due to ever-shifting conditions, regulations, and recommendations in accordance with COVID-19 protocols. Additionally, the role of Head of School and Board Chair are framed by a bounded consensus as opposed to a clear list of responsibilities and behaviors that every Independent School adopts. Pre-pandemic professional learning and guidance provided by NAIS include the Institute for New Heads and The Head's Handbook. NAIS has worked to standardize the role and responsibilities of school leadership and help recruit and mentor prospective school leaders in the independent school community. These opportunities have evolved as research demonstrating continued isolation, burnout, and turnover emerged (Casper et al., 2016; NAIS: Head Turnover at Independent Schools, 2020).

Governance structures are equally challenging to standardize, quantify, and evaluate through the lens of this research. The subjectivity of Board performance and effectiveness is an ongoing challenge in governance evaluation and measurement (Holland, Chait, and Taylor, 1989). Identifying collective best practices for quantitative analysis and utilizing previous NAIS and non-profit Board surveys and assessments helped guide the standard of response to the COVID-19 pandemic, as well as the partnership exhibited with the Head of School. Specifically, Board qualities like size, respect and understanding of the role, strategic thinking, unwavering support of the head and faculty, and actions that engaged the mission of the schools were identified as the practices most beneficial prior to and during the COVID-19 pandemic (Mott, 2014; Baker & Ostroff, 2016; Davis, 2020). Previous governance surveys conducted by NAIS and highly regarded evaluation and measurement tools published by Holland, Chait, and Taylor (1989) framed this research's lens on effective governance structures during the pandemic. Quantitative Design and Data (Appendix i)

Through a mixed-methods approach, researchers crafted an original survey that was administered through Qualtrics. This survey primarily utilized Likert scale responses for consistency and streamlined data collection (Patton, 2002). There were write-in opportunities for respondents to provide additional insight into their experience, as well as questions with responses specific to pre-pandemic crisis management protocols and level of communication between leadership and governance structures. Heads of School were asked for school information such as geographic location, school size, ages served, and any additional information such as religious affiliation, military, boarding program, or single-gender.

The primary task of the research centered on the partnership between leadership and governance structures. Researchers determined, in partnership with NAIS, that Heads of School and Board Chairs would serve as the primary population for quantitative and qualitative data collections. NAIS provided the email addresses for all of the Heads of School in the organization. Each Head of School, totaling 1,558, received the Qualtrics survey and were asked to both complete the survey and to share the link with their Board chair. Certain questions presented when respondents selected their role in the institution so Board chair and Head of School-specific data was gathered, as well as shared reporting.

In total, there were 409 respondents to the survey, 311 Heads of School & 94 Board Chairs, who completed the quantitative survey. The demographics of respondents closely matched the geography, size, and grades of instruction for NAIS schools.

TABLE 1
Comparison of Survey Sample to Sample Population

Geographic Region	Survey Respondents	NAIS Member Schools
West	17%	20%
Southwest	9%	10%
Southeast	18%	18%
Mid-Atlantic/East	29%	28%
Mid West	13%	11%
New England	14%	16%

School Size	Survey Respondents	NAIS Member Schools
701 or more	19%	17%
501-700	12%	15%
301-500	24%	24%
201-300	17%	15%
Fewer than 200	28%	28%

Researchers engaged in a sequential mixed methods study, collecting and organizing quantitative data prior to engaging the planned qualitative interviews with Heads and Board Chairs. Initial findings supported interview questions that expounded on any themes or trends within predetermined conceptual frameworks. Within the quantitative data set, initial findings that engaged research questions and the conceptual framework previously identified were robust.

Governance and Leadership Practices during COVID-19 addressed professional behavior, community outreach, and crisis management protocols. Heads of School and Board Chairs were asked about the level to which board members identified and upheld appropriate governance boundaries, respected sensitive information, handled professional disagreements, and identified the complexity of the circumstances. Previous literature from NAIS suggests that current parents serving on the board can introduce nuanced challenges of competing priorities. Heads of School and Board Chairs were asked about current parents serving on the board and their respect for role boundaries, confidentiality, and personal agendas.

Crisis management practices and pre-pandemic literature suggested that task forces of community professionals should serve as a resource during times of uncertainty. Heads of School and Board Chairs were asked about their outreach into the community for medical, legal, architectural guidance during their pandemic planning and program implementation.

Pre-pandemic crisis management literature suggests that boards should operate regularly as though they are in "pre-crisis" and regularly engage in training and simulations to develop meaningful competencies when crises arise. Board Chairs and Heads of School were asked about their pre-pandemic crisis management training and protocol, specifically, how often they engaged in crisis training on an annual basis. Respondents were also asked how the COVID-19 pandemic informed their view of crisis management training and protocols moving forward.

Governance and Leadership Partnership during COVID-19 addressed collaboration, communication frequency, sense of competency, and topics of importance. Board Chairs were asked specifically about Head of School competency and Heads of School were asked about Board Chair competency. Heads and Board Chairs were asked about the frequency they discussed the financial stability of the school, student enrollment, academic quality, and faculty retention/hiring. Heads of School were asked specifically about Board Chair support and respect for role boundaries.

Pre-pandemic NAIS literature recommends regular communication between the Board Chair and Head of School. A working hypothesis was that the COVID-19 pandemic would prompt an increase in this communication and Heads and Board Chairs were asked about any changes in their communication frequency or standing meetings.

Heads of School were asked how the pandemic has impacted or informed feelings of isolation, burnout, and capability as a leader in their role. Previous research about the evolving and demanding nature of this role informed this inquiry. Beyond personal feelings of burnout and isolation, Heads of School were asked about life experiences, training, or competencies that were useful in their leadership during the COVID-19 pandemic.

The quantitative data set was uploaded into Stata for continued statistical evaluation beyond researchers' initial findings of survey responses. Non-descriptive qualities in school characteristics such as size, student composition, geographic location, grades served, boarding/non-boarding, religious affiliation were also explored in Stata for additional insight and possible relationships.

Qualitative Design and Data (Appendix ii)

Utilizing quantitative data, the interview protocol also followed the conceptual frameworks closely in qualitative data collection. Researchers conducted qualitative interviews with eight Independent Schools. During interviews, we followed a semi structured interview protocol with categories of questions that mirror conceptual frameworks of Governance and Leadership Practices during COVID-19, Governance and Leadership Partnership during COVID-19, and Impact on Head of School Role. In total, eight Heads of School and five Board Chairs were interviewed. Researchers intentionally identified schools that represented NAIS institutions in geography, size, and students served to be as representative as possible.

Region	Affiliation	Grades Served	Location	Coed/Single Gender	Day/Boarding
West	Nonsectarian	Grades 7-12	Urban	All-Girls	Day
Midwest	Nonsectarian	Grades 9-12	Suburban	Coed	Boarding/Day
Midwest	Nonsectarian	Grades PK-12	Suburban	Coed	Day
Southwest	Religiously Affiliated	Grades 6-12	Urban	Coed	Day
Southeast	Nonsectarian	Grades K-12	Urban	Coed	Day
Southeast	Nonsectarian	Grades K-12	Suburban	Coed	Day
Northeast	Nonsectarian	Grades 5-12	Rural	Coed	Day

Interviewees were informed that their participation was voluntary and that all information collected in the interview would be treated with respect. Participants were also reassured that while this report would be submitted for potential publication, they and their school would not be identified without their consent. Participants were asked permission for their responses to be recorded for accuracy and researchers utilized Otter text software to record interview sessions.

Areas of particular interest in this data collection included the personal insight into the importance of the head and chair partnership, qualities and clarity of Board role and expectations, and leadership competencies that proved effective during the COVID-19 pandemic. While themes of head isolation and burnout emerged in our conversation, we focused on conceptual frameworks emphasizing leadership and governance practices and partnerships to be respectful of the time and streamlined data collection.

Key quotes gathered through these processes helped us, as a team, to indicate overlapping findings and supported thematic frameworks in the data during debrief meetings. We then segmented and categorized quotes and observations before assigning meaning to the data. We develop themes by reading and listening to recorded data, then identifying illustrative quotes that support these themes across the data set. Emergent themes within conceptual frameworks were established during team meetings (Appendix item iii). Additionally, coding themes were drawn from within both groups of Board Chairs and Heads of School.

FINDINGS

As has been established, the COVID-19 pandemic posed unprecedented obstacles for independent school leaders, especially Heads of School and Boards of Trustees. As we examined through our research how school leaders addressed the challenges for schools and school leaders that were created by the pandemic, certain trends and themes emerged and were supported by both our quantitative and qualitative data. While outliers existed, our findings remained relatively consistent, and commonalities and tendencies were evident.

Finding #1: The COVID-19 pandemic created more demands on Heads of School and led to increased involvement from Boards of Trustees in independent school governance.

Our first research question - how were governance systems and leadership roles in independent schools affected by the COVID-19 pandemic - aimed to find answers to the following subset of questions: First, how did the independent school response to the pandemic affect governance practices, specifically the roles and responsibilities of Heads of School and Boards of Trustees? Second, what factors (such as training for the Head of School role, prior professional experience, and other interventions or training programs) affected resiliency among leaders - specifically, Heads of School - during schools' responses to the pandemic? Third, how were issues of isolation previously experienced by Heads of School magnified or exacerbated, if at all, by the COVID-19 pandemic and crisis?

The roles of both Heads of School and Boards of Trustees changed and expanded during schools' responses to the pandemic, and communication between Heads and Board Chairs increased in frequency. Both Heads of School and Board Chairs, for example, consistently reported that communication between Heads of School and Board Chairs increased during the pandemic. 47% percent of Heads surveyed replied that they communicated "more frequently" with their Board Chairs, and 24% stated that they communicated "far more frequently." For their part, 54% of Board Chairs responded that they communicated "more frequently" with their Heads of School, and 20% replied, "far more frequently."

Q19 - Has the frequency of communication changed between the Head of School and Board Chair during the COVID-19 pandemic? (Heads of School responses)
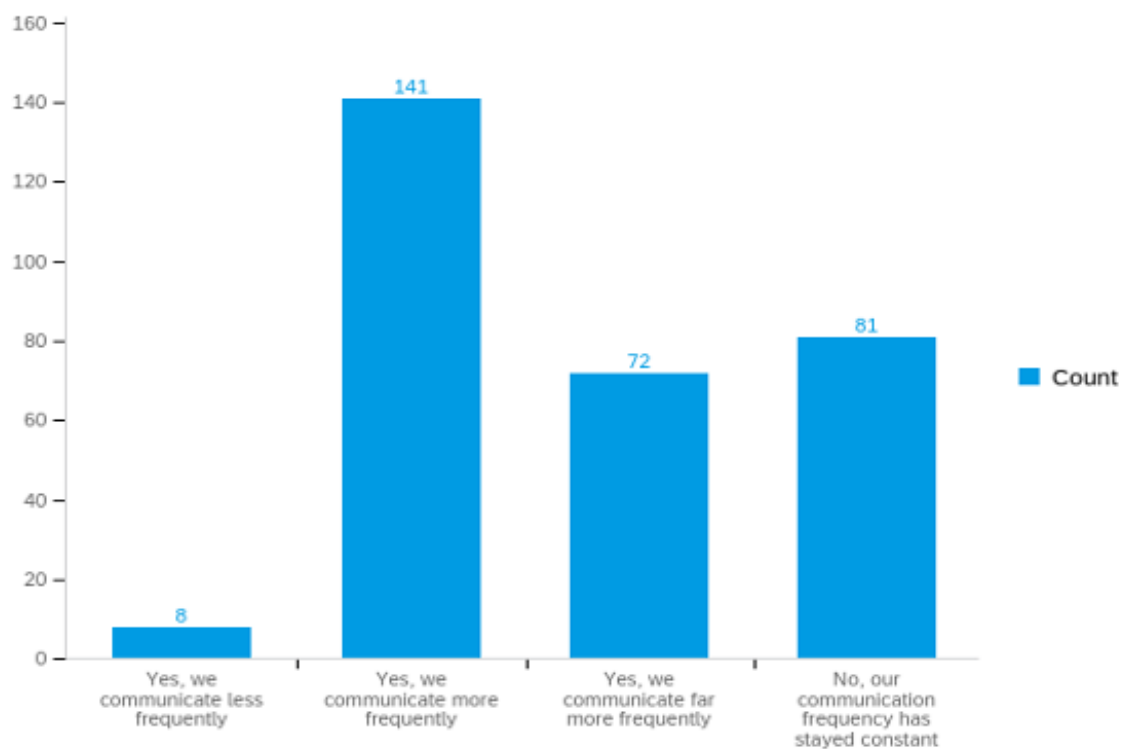

Q19 - Has the frequency of communication changed between the Head of School and Board Chair during the COVID-19 pandemic? (Board Chair responses)
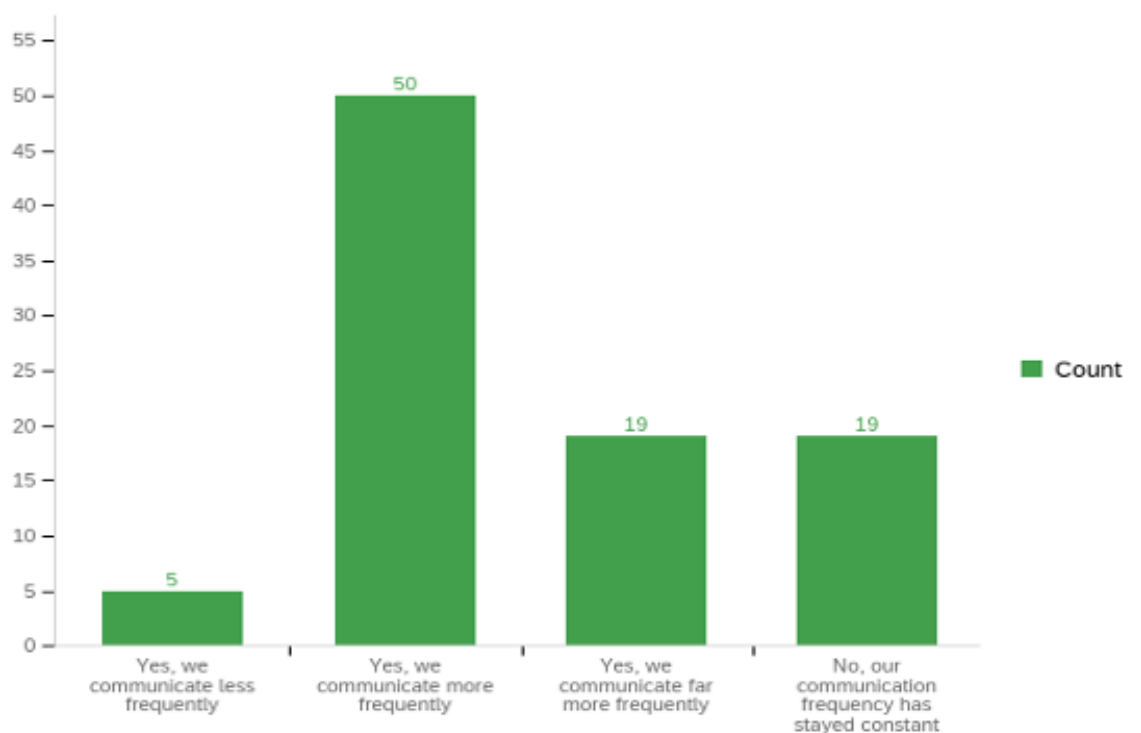
A survey comment from one Head of School typified how many schools reacted in the immediate term: "The Board met every week for the first couple of months and then moved to every two weeks in June to discuss progress." While Boards of Trustees typically meet approximately once a month in independent schools, Board Members generally faced much higher demands on their time and expertise during the pandemic, particularly between March 2020 and September 2020, when many independent schools reopened. One Head who was surveyed reported that it was "harder to take time 'off line' for fear of being out of communication. Travel (which is a major stress reliever for my family) feels loaded with guilt." Another observed that "normal 'day to day' operations are often sidelined, as I deal with COVID-19 pandemic issues. Communications that are normally routed to other administrators come directly to me, and I have to push the requests back to the appropriate administrator." In sum, the feelings of the following Head of School summarize the increased workload that many of her peers experienced: "The role feels like it has drastically increased and kept me from keeping solid boundaries and work/life balance."

Despite the increased involvement of Boards in pandemic responses, long-range planning, and, sometimes, in day-to-day operations of schools, Heads of School whom we interviewed and surveyed largely believed that Boards worked appropriately and within the boundaries of their roles. Asked to gauge their level of agreement with the statement, "During the COVID-19 pandemic, from March 2020 to September 2020, Board Members worked appropriately within the boundaries of their role," 68.5% of Heads "strongly agreed" with that statement, while 20% "somewhat agreed."

Q6 - During the COVID-19 pandemic from March 2020 to September 2020, board members worked appropriately within the boundaries of their role. (Head of School responses)
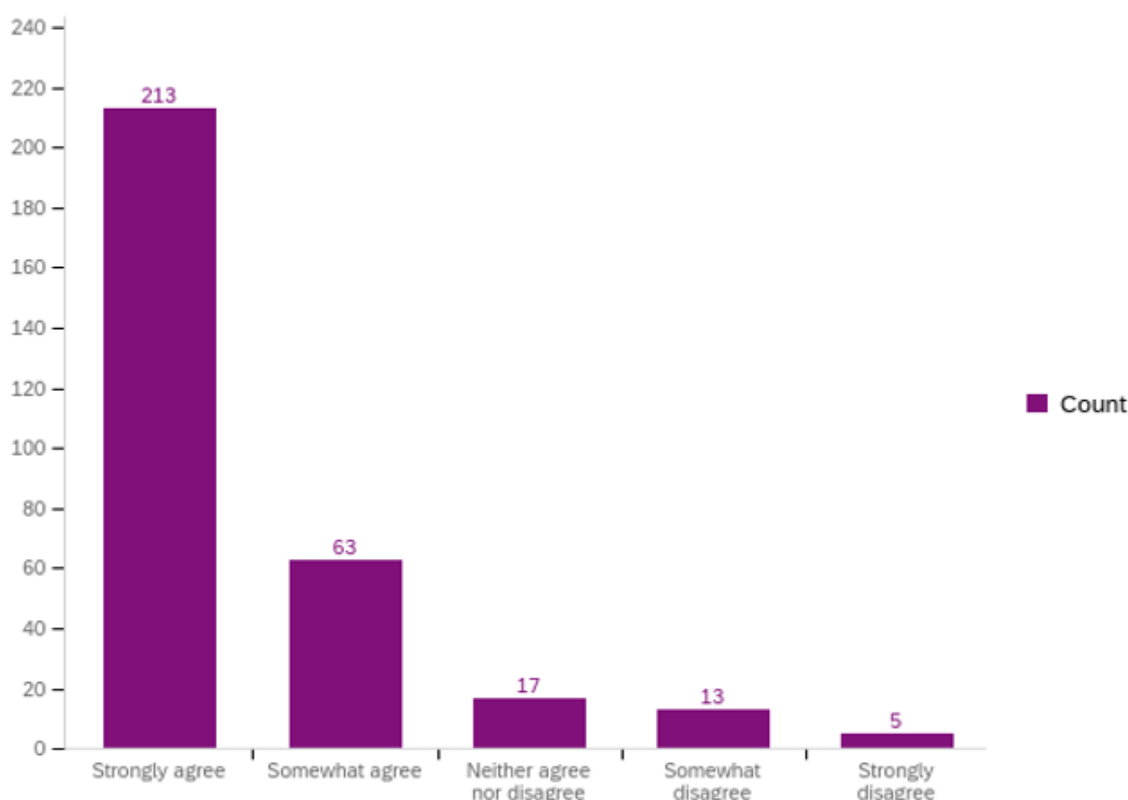
Heads of School, who were addressing unprecedented circumstances for which they often lacked experience or expertise, often welcomed increased Board of Trustee involvement in reopening and operating schools. For example, one Head interviewed for our research commented that after hearing from parents more frequently during the summer of 2020 that they were concerned about the safety of their children returning to school in the fall, "I was able to pull the executive committee together and say, 'listen this is the concern that I'm feeling. And this is what I think we need to do.' And the executive committee said that they were willing to meet, they were willing to talk." While the Board ultimately deferred to the Head regarding decision-making about day-to-day operations of the school, the Head was comforted by the fact that "the Board had been engaged throughout the entire summer...we had probably eight or nine different subcommittees that were meeting to plan various aspects of the school." The Head felt that her Board's level of engagement was appropriate; she felt that a partnership existed and that she was making decisions in concert with the Board but that the Board was not overstepping its bounds. Boards often simply served as advisors or consultants, which alleviated feelings of isolation and anxiety that many Heads of School were feeling as they tried to plan for reopening their schools in September.

Board Chairs were even more confident than Heads that their actions in the face of the pandemic were appropriate. In response to the same statement referenced above, "During the COVID-19 pandemic, from March 2020 to September 2020, Board Members worked appropriately within the boundaries of their role," 81% of Board Chairs "strongly agreed" with the same statement, while another 16% percent "somewhat agreed." One Board Chair characterized their involvement as maintaining with the Head of School a "solid, trusting relationship that allowed for support as necessary/needed, allowing HOS and her leadership team to guide important decisions." Another Board Chair remarked in the survey, clearly delineating the roles of the Chair and the Head, "The relationship is mutually respectful, and the Head's role as an executive of and decision-maker for the school is fundamental." We would note that the difference between the response of Heads of School and Board Chairs to this question, while not tremendously significant, is worthy of further discussion, which we address in our recommendations.

There was no true precedent for the pandemic, and it became evident in our research that all school leaders felt at least to some degree unprepared to respond to it. Nonetheless, there were a number of discrete prior experiences that Heads of School and Boards of Trustees believed prepared them to respond more effectively to the pandemic. Prior experience in crisis management, for example, whether dramatic or more mundane, prepared Heads of School to respond confidently and effectively to the complications posed during the bulk of 2020. All school leaders must become adept at managing crises during their tenures if they are to succeed. As Torres, et al (2020), writes, "The demands of parents are fierce and constantly changing; it is hard to keep up with them while maintaining a sense of integrity with respect to the mission and values. Faculty and staff are also a very demanding group of people to manage effectively. The Head of School goes from one battle to the next and has to have the stamina for it." Many of the Heads of School interviewed for our research pointed to experience managing crises that they believed made them better prepared to manage their school's pandemic response. For example, as has been widely discussed and covered in the media and in the literature, there have been countless instances of sexual assault and misconduct in independent schools, and so, unfortunately, many Heads of School have had to craft institutional and individual responses to those offenses.

At least one Head cited this experience as preparation for his school's pandemic response, commenting, "when you're dealing with an issue of that magnitude - of that seriousness and of that potential harm to the school's reputation - leaving aside the the the impact on other young men and women who were potentially involved, that took a lot of our Board's energy and focus" prior to the pandemic. In turn, during the pandemic, after previously dealing with issues of sexual misconduct, the Head of School realized "the Board has to be involved (in crisis management), so I made sure that the Board was involved." Another Head reported that "when I first got to my last school seven years ago, it was really in a bad way. And during the course of that seven years, we were able to reverse declining enrollment and we were able to reverse a financial shortfall," experience that she believed better prepared her to approach her school's pandemic response. As she stated, "I was able to, I think, to jump in right away and feel like, you know, 'this is stressful and I understand that, but I also understand existential problems for a school.'" In responding to the pandemic, she was able "to feel a sense of confidence," and that her previous experience in crisis management as a Head of School prepared her for the current crisis.

The job of a school leader is generally considered to be a lonely one. An independent school Head of School has no true peers within his or her organization. While most schools have a senior administrative team, consisting of other administrators who manage teachers and other school employees, everyone ultimately answers to the Head of School. In turn, the Head works for the Board of Trustees. Heads of School must focus on their relationship with Boards of Trustees in a manner that is unique to that position; furthermore, as our research illustrated, the efficacy of the Head of School-Board Chair relationship varies by school. During the pandemic, the importance of this relationship was heightened.

For the large majority of Heads of School, feelings of isolation previously experienced were intensified as Heads and schools responded to the COVID-19 pandemic. Asked to what degree they agreed with the statement, "The COVID-19 pandemic has increased feelings of isolation in my role," 42% percent of Heads "strongly agreed," and 35% of Heads stated that they "somewhat agreed." Similarly, asked to assess their feelings about the statement "The COVID-19 pandemic has increased personal feelings of burnout" with respect to their professional duties, nearly 60% (59.67%) of Heads "strongly agreed," while nearly 26% (25.67%) "somewhat agreed."

Q21_1 - The COVID-19 pandemic has increased feelings of isolation in my role. (Head of School responses)
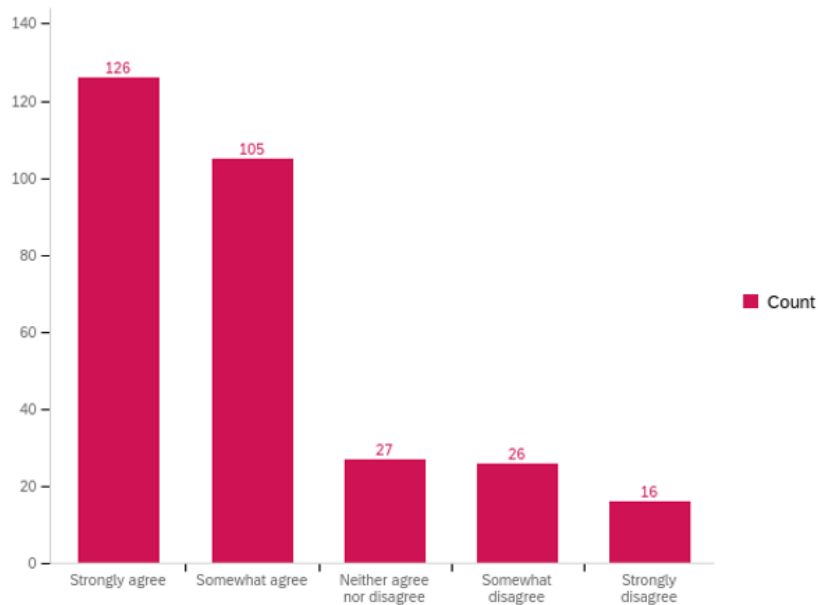
Given that under the best of circumstances, Heads of School can feel detached and their position can lead to feelings of stress, these findings are both revealing and troubling.

This research led to several comments from Heads of School that addressed the feelings of isolation, burnout, and powerlessness that they felt during the pandemic. One Head remarked, "I'm really grateful that I'm not a first-time Head of School. I think this would be incredibly difficult because there are days when I feel like a rookie because I've never done this (i.e., dealt with a situation like the pandemic) before." She also stated clearly, "Yes, I have experienced the feelings of isolation as the Head of School, and that has been exacerbated both by the COVID-19 pandemic, as well as being new to the community….at our faculty staff meeting on Monday, I talked about the importance of connection and I just said, this is something that I am personally struggling with: not being able to feel fully connected to our community." As she notes, Heads of School who were new to their communities, even those with Head of School experience at another school, found transitioning to a new school during 2020 to be particularly difficult. As another experienced Head who was new to her school - and whose Board was relatively uninvolved - observed, "I was totally alone in a community I didn't know."
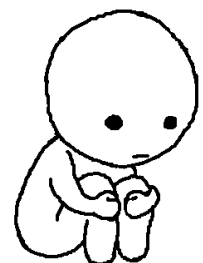
Whether Heads were new to their schools or not, survey questions revealed consistent emotions among Heads and reflected their feelings of isolation and, in some cases, severe helplessness. Many Heads were pessimistic about their personal stability and the sustainability of their professional roles. One Head's comment, "The time commitment required has increased greatly," reflected familiar feelings. Another added, "There are no more weekends. I was unable to take a vacation or time with my family over the summer." One Head summarized their feelings thusly: "It is impossible to express the impact of the demands that the pandemic has placed on my role, which already demands 24/7. The pace is relentless; and the needs of the community (employees, students, families, trustees) are unceasing." Our research clearly shows that the position of Head of School, which even prior to the pandemic was perhaps considered unreasonably demanding, has been made even more difficult by the current crisis in independent schools.

Unfortunately, many of the above comments were relatively benign compared to the feelings that other Heads of School expressed. Another Head declared, for example, "The stress level that comes with being in constant decision-making mode is off the charts. At the risk of being dramatic, it feels as if we are making life or death decisions," while yet another stated, "(The pandemic) has dramatically impacted the demands placed on the role. It feels increasingly lonely and while the Board acknowledges the stress, I don't feel they truly appreciate all that we have done and accomplished. The day-to-day stress and the need to outwardly remain calm and positive is taking its toll." Finally, one Head described the impact of their job in stark and straightforward terms, commenting that the pandemic added "Time and stress. I wake up thinking about it, think about it all day, and go to bed thinking about it. It has negatively impacted my family and marriage, with no end in sight other than leaving this position." Similar sentiments are rampant throughout our research, and Heads of School in both our qualitative research and in our surveys questioned how long they could continue in their roles at their current pace. While some relief may be on the horizon, so to speak, in the form of vaccines, a return to normalcy is not necessarily imminent, which does not bode well for Heads or for schools.

Finding #2: While there was no experience, education, or background that universally prepared Heads of School or Boards of Trustees to respond to the pandemic, there were consistencies among schools that were more successful in their management of the crisis.

Our research coalesced into six general areas that we believe generally led to more effective school leadership and, in turn, to more success for schools in addressing the difficulties posed by the pandemic. These are:

1.A strong relationship between the Head of School and the Board Chair:

Heads of School who felt that their relationship with their Board Chair was well-established, secure, and based on mutual trust and respect generally felt more successful in managing the pandemic. The Head of School-Board Chair relationship, which is critical under normal circumstances, proved to be even more important during a time of unprecedented crisis. One Head who was interviewed and who was satisfied with his school's pandemic response commented, "I've got a really strong relationship with the Board overall...the bottom line for me - and I don't know how unique it is or not among schools - is that my Board has been very hands-off." Survey comments likewise reflected the importance of the Head of School/Board Chair relationship. For example, a Head stated, "Both (the Head and Board Chair) were experienced and had been working together for many years. This was our biggest but not first crisis," while another added, "We've always had a great relationship, and it was strengthened."

2. The more years of experience a Head of School and/or a Board Chair had, the more likely they were to be confident in their decision-making and in their school's response to COVID-19:

As noted above, our qualitative research indicated that the relationship between the Head of School and the Board Chair appeared to be an important facet of a particular school's success, and this partnership was more likely to be strong if the Head and Chair had been working together for multiple years. One Head, who felt that his Board gave him appropriate leeway, commented, "If a Board doesn't necessarily have full faith in the decision-making or in the operations of the school, it's gonna look very different...that's just the benefit of being here long enough and having built up some capital with the Board."

Yet even in the absence of an extended period of working together, experience as a Head and/or as a Board Chair also dictated to some extent the success of an individual school. The longer a Head or a Board Chair had been in their role, at any school, the more likely they were to feel comfortable addressing the crisis at hand. One Head surveyed praised their Board Chair: "Board Chair has a great deal of experience and helped guide the Head of School." Another Head remarked, "the experience of being a Head for 9 years has been helpful," and, finally, another experienced Head stated, "I certainly don't have all the answers, but I've got a head start." While this topic was not specifically addressed in our quantitative research, interviews and responses to open-ended questions indicate that a Head of School's level of experience and the length of time that a Head and Board Chair have worked together may lead to more effective crisis management and could be a topic for further research.

3. Pre-Pandemic Crisis Management Training had a statistically significant relationship on Board practices during the COVID-19 pandemic:

Tenure and time not only promotes relationships, connections and trust, it also builds opportunities for training and shared knowledge. Board Chairs and Heads of School were asked During the COVID-19 pandemic from March 2020 to September 2020, board members worked appropriately within the boundaries of their role. These boundaries are specifically outlined in NAIS publications and training. Specifically, board members are charged with hiring a Head of School and managing governance processes. A concern voiced by NAIS members schools at the onset of the pandemic was that board members were, or could potentially, overstep their boundaries and voice feedback about student programming, academic processes, and other school business.

Clarifying questions regarding boundaries and board behavior during the pandemic included, Board members recognized and responded appropriately to the complexities of the circumstances, Board members were committed to resolving internal conflicts in a professional, positive way, allowing progress to be made, and Board members were committed to resolving internal conflicts in a professional, positive way, allowing progress to be made.

Schools that engaged in any crisis management training prior to the COVID-19 pandemic experienced stronger support and respect for role boundaries by their Boards. In order to test the significance of pre-pandemic crisis management training, researchers created a new variable in STATA, CrisisSome. This new variable grouped the responses, "When Needed," "Once A Year," "Twice A Year," and "Multiple Times A Year," to the quantitative survey question "Prior to the COVID-19 pandemic, how often did the Board engage in crisis management training?"

The new variable CrisisSome was utilized to understand if any Crisis Management training demonstrated a relationship to Board boundaries, practices, and behaviors during the COVID-19 pandemic. Utilizing an independent sample t-test to understand the relationship between the independent variable, pre-pandemic crisis management training, and the dependent variable, Board practices during the COVID-19 pandemic, yielded statistically significant results.

TABLE 3
Any Pre-Pandemic Crisis Management Training and Board Practices

Independent sample t test, Crisis Management Training			
	Pre-Pandemic Board Crisis Management Training	t	n
Board Boundaries	.0017**	3.2	404
	(.61)		
Board Grasped Complexity	.0000***	4.6	402
	(.5)		
Professional Behavior	.00003***	3.6	401
	(.62)		
Manage Critisism	.0072**	2.7	399
	(.8)		

Note: *p<.05, **p<.01, ***p<.001. Standard deviations are reported in parentheses under means.

Researchers observe that training does not traditionally occur in isolation. Boards that engage in crisis management training would likely engage in other training as well that could frame their practices and behaviors during the pandemic. One Head of School commented, "Due to the pandemic, I realize we need to engage proactively and more regularly in crisis management training." This data demonstrates the strength of training and the "pre-crisis" mindset as a predictor of successful and desirable behaviors among governance structures in the event of unpredictable and unprecedented events.

4. There were some established crisis management protocols, training, or experiences that led school leaders to feel more prepared to address the challenges posed by the pandemic:

While there was no universal experience that prepared Heads to deal effectively with the pandemic, there were themes that emerged among Heads who felt that they were able to manage challenges effectively. These included previous experiences working in teams or prior crisis management as a Head of School. One Head offered, "I actually was in the Marine Corps for four years right after high school. And, you know, there was an aspect of that that has served me well in a number of ways throughout my career, but I think the ability to try to understand and navigate a high-stress situation, certainly was, was helpful but that's something I learned." Another Head relied on his experience as a college athlete and serving as the captain of his college football team in managing his school's pandemic response: "What I drew from team sports informed almost everything I do...The humility of it all, the comfort level with discomfort or a little amount of chaos. The camaraderie associated with circling the wagons...just that sense of we're all in this together and we've got to serve each other...I've often thought of my interaction with the Board like I'm interacting with the coaching staff...let me tell you guys what I'm seeing, you help me understand what you're seeing from your perspective, and we're not gonna fail here...that element of kind of removing ego, and then just asking yourself how are we going to assemble the different parts here in a way that helps us kind of get through it."

Finally, a third veteran Head stated, "At (my previous school), I was constantly dealing with weird shit...at one point we had to deal with a threat of terrorism. Like, FBI on campus. It wasn't even directed at us - it was directed at (a nearby military school), but because of proximity, we had to shut down the school...We had tornadoes, in one year I had five faculty emergencies that all resulted in one person having a stroke, one person having a brain hemorrhage, one person had a heart attack - we were constantly calling the ambulance - and so kind of getting used to crisis management, helped me a lot with COVID."

Although not every Head will be a former Marine or a college sports captain, breadth of experience may be an important component of a successful Headship; experience in other fields certainly was beneficial for at least some of the Heads in this study. Additionally, while crises are not necessarily welcomed in schools, as alluded to above, our research illustrates that such experiences hone and strengthen leadership skills, and there is some overlap between experienced Heads of School and experience in crisis management, although not all experienced Heads have faced crises of great magnitude.

5. Unprecedented and increased cooperation and collaboration among peer schools in the same geographic area:

Independent schools exist in a free marketplace; demographics and economics dictate to a large extent the success or failure of most independent schools. As a consequence, competition can develop between schools for the limited number of students and families in their respective areas. While collaboration and camaraderie among schools and Heads exist, it is limited; Heads might regard one another warily as they seek to gain advantages - and exploit peers' weaknesses - to the advantage of their school's programs and enrollment.

Yet during the pandemic, schools and Heads sought advice from one another and collaborated in an unprecedented fashion. As one veteran Head of School observed, "I would say that we have a nice group of Heads in the (large U.S. city) area...but we've been connected, more than we've ever been before, to create a sort of support group. And that's been really, really helpful. I think before we saw ourselves, even if we weren't really competitors, we kind of acted like we were...this has helped break those barriers down now because, you know, you take the (well-known schools) and, you know, they're struggling just like everybody else is. And I think there's been a leveling impact in some sense...there has been a good esprit de corps for people to share resources and support with each other and guidance. You know, knowing that it's really hard." Another Head from the Southwest region reported, "We actually had two calls every week: One with the entire group of independent school Heads throughout the Southwest, and one for just (large Southern city) Heads. And those were fabulous, in terms of support, analysis, decision-making processes, figuring out processes. I mean, those were invaluable...it was pretty overwhelming and I realized, wait, I cannot be out on an island, this cannot be (Head of School's name) and the senior team deciding how we're going to respond (in isolation)."

Finally, a third Head stated, "COVID has actually made me feel less isolated. There's a (large Midwest city) consortium of independent schools; we're meeting once a week. That has been unbelievably valuable. This is gonna sound weird, but I think there have been - at least for me - there have been so many positives that have emerged during COVID, and one of them has been the reconnection of Heads and the collaboration that I've experienced in my region. That's been incredible." Finally, another Head commented in our survey that managing the pandemic "has been the best lesson in collaboration and professional development with which I have been associated."

6. Consultation with experts in crafting schools' responses to the pandemic:

Almost exclusively, School Heads and Board Chairs lacked the expertise needed to craft fully how schools would react to the myriad challenges they faced. Many Heads and Boards of Trustees sought the advice of experts in a variety of fields, including law, human resources, facilities management, science, and medicine. As lives were literally at risk, Heads and Board Chairs utilized these experts - including independent school parents - and others to ensure that they were fully informed in their responses and that they were ensuring the safety of their students and faculty members. In one school, the Head stated that "We layered in an advisory committee on the medical front...So, you know the different elements of strategic financial thinking, we're doing together right now…. we formed an advisory a Medical Advisory Panel... the head of the committee is, is, is a grandfather of a student, and he's a very, very well-known infectious disease specialist." Another Head of School commented in our survey, "We have developed a Pandemic Planning Committee, co-chaired by two administrators. One has a strong background as a professional epidemiologist."

Finding #3: The COVID-19 pandemic changed the roles and responsibilities of both Heads of School and members of Boards of Trustees.

Our second major research question considered how the independent school response to the pandemic affected governance practices, specifically the roles and responsibilities of Heads of School and Boards of Trustees. Crisis management protocol and governance best practices dictate that responsibilities should not change during unprecedented times. When roles are clear during times of pre-crisis, boundaries and expectations are effectively mobilized and serve institutions most effectively.

More specifically, we considered the following questions: How did Board of Trustees members' roles change as a result of the pandemic, if at all? How did Board of Trustees members manage their responsibilities? How did Heads of School and Board of Trustees members work together? Did Board Members recognize their roles? Were current parents on the Board appropriate in their responses? How prepared were schools, Heads of School, and Boards of Trustees for the pandemic? And, finally, what long-term impact, if any, will the responses of independent schools to the COVID-19 pandemic have on governance practices in schools going forward?

Boards at some independent schools remained "hands-off," so to speak. One Head of School at a boarding school in the Midwest reported, "I would give (the Board) updates...I'd send an email saying, 'this is the action plan. This is what we're doing. Here's the rationale. Let me know if you want to discuss this. The rationale for this is x, y, and z, but we feel like this is the most prudent action at this time.' And the Board was great. So I was really lucky with my Board because there was, in some ways, there was no interference at all."

Yet, our research did show variance in how Board Members approached their roles. In contrast to the examples cited above, in other schools, Boards of Trustees became far more involved in day-to-day operations and decision-making. Additionally, current parents on Boards of Trustees, of whom there are many, sometimes overstepped appropriate boundaries. One surveyed Head of School, for example, remarked, "Our Board Chair has the skills and knowledge to lead the Board, but is too easily influenced by peers and especially by members of the executive committee. This group has been unable to guide concerned families to school personnel and has consistently chosen to represent their 'base,' colleagues and friends." Another Head simply stated, "Insane behaviors by BOT (Board of Trustees)." With respect to parents, the following comment by a Head is illustrative of the blurring of boundaries: "The Board Chair is a physician in the community and a former parent. Parents went directly to him with several concerns, including his medical opinion as to whether the campus should open. It took a while for him to redirect them. I believe his external relationships provided a significant conflict of interest." One Head observed that "The chair has worked very hard to bring trustees to a place of consensus. However, his tendency to assess all programming based on his daughter's experiences has felt very unsupportive to my colleagues and to me, and it has set the tone for the other trustees to do the same." Finally, as one Head noted, in many schools, "Parents and students want to be on campus. Teachers don't. The pandemic has caused resentment for all different parties at different times," so there was a high potential for conflict between Heads, Boards, schools, and their parent constituencies that was, at least in some cases, exacerbated by Boards and Board Chairs who approached their roles in an unprofessional manner.

As the pandemic progressed, some Boards became more involved not only in long-range pandemic response planning but also in the day-to-day operation of the school. For some Heads of School, this was unwelcome. As one Head stated in the survey, "Board chair overstepping bounds into operations significantly during the pandemic." Nonetheless, in most instances, lacking training or experience to deal effectively with the pandemic, Heads of School welcomed more Board involvement in crafting schools' responses to the challenges posed by COVID-19. One Head of School we interviewed commented, "In March (2020), all of us were just sort of winging it and figuring out (expletive): What are you doing, what am I doing, how are we gonna deal with this? What's the state telling us? I don't think there was a lot of Board advice...but come summer, we realized there really was going to be an active role for the Board in deciding whether or not we could even go back." The Head also did not make decisions about the school and the pandemic in isolation: "I did make very clear that any decision that I made would have to be vetted by and approved by two groups. One was the Medical Advisory Panel, and the second was at least the executive committee, if not the entire Board." Other Heads of School reported similarly increased involvement from their Boards of Trustees as well.

There were positive repercussions of increased Board involvement. One Head commented that her Board "established a support and evaluation committee, which we have not traditionally had." As she was in her first year as Head of her school, her Board "saw that as being specifically useful this year, given the circumstances of my transition...that that committee has met and it has been good. Rather than working just with the Board Chair, I've had other members of the Board who have reached out to me occasionally to check-in, to offer support, and to see what types of things could they be doing or others could be doing to help us navigate the school year." One Chair commented, "As Chair, I recognized that this was an extremely stressful time for our Head of School...I routinely checked in with the Head of School and stayed informed of the status of (the city's) protocols for schools." Other Head of School observations, such as "we have had a critically important relationship this year," and "our chair became much more active during pandemic response planning, but still drew an appropriate line between governance and operations," further underscore the instances of growth in Head-Chair relationships during the pandemic. Our research notes below the importance to a school's health of a strong Head of School/Board Chair relationship, and, for some Heads and Board Chairs, the development of such a partnership was an unexpected benefit of the pandemic.

RECOMMENDATIONS

After considering our research on the impact of the COVID-19 pandemic on independent school governance, as well as the previously evident demands on Heads of School in independent schools, the following are our recommendations to ensure the success of independent school Heads, Boards of Trustees, and independent schools:

1.Ensuring a strong relationship between Heads of School and Board Chairs.

As our research indicated, a strong relationship between an independent school Head of School and their Board Chair is critical to the success of both an individual Head of School, as well as to the school itself.

Simply put, while a new Head can sometimes be invigorating and healthy for a school, in general, consistency in the Head of School role is advantageous to an independent school. Heads of School "are vital for ensuring student success. Effective Heads help maintain a positive school climate and advocate for the school in the community. Their faculty recruitment practices, financial management, and strategic planning indirectly impact student achievement by creating positive learning environments in the school. Yet instability in school leadership hurts everyone: Research with public school principals has shown that their abrupt departure disrupts school progress, raises teacher turnover and lowers student achievement" (NAIS, 2020). Therefore, reducing Head turnover and increasing the average tenure of independent school Heads is in the best interests of schools and students. As one surveyed Head commented, "Trust and appreciation on both sides was paramount to the success of this experience (managing the pandemic)," a sentiment that is true not only in crisis but in the day-to-day life of a school.

There were positive repercussions of increased Board involvement. One Head commented that her Board "established a support and evaluation committee, which we have not traditionally had." As she was in her first year as Head of her school, her Board "saw that as being specifically useful this year, given the circumstances of my transition...that that committee has met and it has been good. Rather than working just with the Board Chair, I've had other members of the Board who have reached out to me occasionally to check-in, to offer support, and to see what types of things could they be doing or others could be doing to help us navigate the school year." One Chair commented, "As Chair, I recognized that this was an extremely stressful time for our Head of School...I routinely checked in with the Head of School and stayed informed of the status of (the city's) protocols for schools." Other Head of School observations, such as "we have had a critically important relationship this year," and "our chair became much more active during pandemic response planning, but still drew an appropriate line between governance and operations," further underscore the instances of growth in Head-Chair relationships during the pandemic. Our research notes below the importance to a school's health of a strong Head of School/Board Chair relationship, and, for some Heads and Board Chairs, the development of such a partnership was an unexpected benefit of the pandemic.

Heads of School and Board Chairs need to prioritize the formation of a close professional relationship characterized by mutual respect, open communication, and respect for the other's responsibilities and roles. The development of this partnership is arguably the most important factor in determining a Head's success and should be emphasized from the moment a Head of School is appointed. Beyond communicating with candor and civility, Heads and Board Chairs should engage in regular professional development; both NAIS and regional independent school associations offer a variety of beneficial conferences, workshops, and webinars. Doing so not only leads to the likelihood of a better outcome during a crisis but also increases the chances of a Head's sustainability and of a thriving headship.

2. Continuing the practice of collaboration and cooperation between Heads and schools, particularly in regional associations, during "normal" times.

As noted elsewhere, one unexpected benefit of the COVID-19 pandemic was the level of increased cooperation between Heads of School, including those who had perhaps seen themselves as rivals in the past. As described above, Heads who developed strong collaborative relationships with other heads in their local area reported less isolation and improved decision-making; appreciation for this newfound teamwork was universal among Heads of School. While this collaboration was in this instance born out of necessity, it should continue once the pandemic is no longer the top priority of schools. The most successful schools and Heads in the future will likely continue to seek synergy with Heads in their regional associations and in nearby schools through formal and informal conversation, working groups, and regular meetings around common issues and frustrations. This practice will, in turn, not only serve to nourish Heads of School in their professional and personal lives, reducing burnout but will also lead to more successful schools everywhere, as any competitive advantage lost will be superseded by Heads who feel less isolated and have more access to good ideas and best practices.

3. Establishment of crisis protocols and training.

While in some sense, there was no way for Heads, Board Chairs, and schools to be prepared for the pandemic, our research made apparent that there were some experiences that Heads found beneficial as they faced the crisis posed by the pandemic. Boards of Trustees should ensure that crisis management and protocols become topics for regular discussion and training going forward. As one surveyed Head noted, "It has become more obvious that we need to have crisis management training more frequently. It has also forced smaller group task forces to work on various details to build stronger plans." Encouragingly, some Heads indicated that this is already happening in their schools. One Head, for example, volunteered that "A new Risk Assessment Committee has been established," while another, while admitting that their school's pandemic response was completed "Mostly in a learn as we go manner," added that "we've also improved our risk management (and crisis management) protocol simultaneously." Practices such as these will ensure that schools are ready to react and, if necessary, pivot to new modes of operation and instruction when the next crisis arrives, as it inevitably will.

4. Board training, especially around appropriate roles for Board Members

While many Heads of School were in sync with their Board Chairs and Members, there were a not insignificant number of Heads who struggled under what they saw as an intrusive and overreaching Board of Trustees. The best Boards and Chairs took the tack expressed by one Chair in our survey: "Very clear and constant communication. TRUST in the Head of School! There were never any surprises. Understanding the role of the Board in not getting involved in operational matters." Yet, another Head recalled, "a difficult spring when boundaries were crossed." The NAIS Trustee's Handbook provides a solid framework for Board work that must be strictly adhered to by Board Members. Schools are complex organizations, and they need Board members who have expertise in human resources, the law, and risk management, among other important areas. While current parents will always be Board Members, as is appropriate, Boards should also have alumni, educators, and others with less of immediate interest in the day-to-day operations of the school to provide differing perspectives. While this has always been true, the COVID-19 pandemic has highlighted this necessity.

5. Continue to refine preparation for educators who aspire to become Heads of School

While no job can perfectly prepare an aspirant for the job of Head of School, as noted elsewhere, there were a number of experiences that sitting Heads felt enabled them to address more deftly the pandemic in their schools. The Head's Handbook, an NAIS publication, is a thorough introduction to the Head of School role and is recommended reading for anyone who has considered Headship. A number of sections of the book warrant special attention and, perhaps, expansion.

While most Heads begin as classroom teachers, the pandemic has underscored the need for school leaders to have diverse skill sets that might be best-developed by spending at least some time in a work environment outside of schools. In The Head's Handbook, former Head D. Scott Wiggins, for example, writes extensively about "non-traditional paths to headship," profiling a number of Heads who did not "come up through the ranks," so to speak, and were instead what one would call "career-changers." As Wiggins writes, "As the role of Head of School in independent schools continues to expand into myriad areas of responsibilities, more and more people from non-traditional backgrounds will be looked upon as the preferred candidates to run the independent schools of the future" (70-1). While an aspiring Head should not necessarily leave the field of education, as leaders and managers of complex organizations, school leaders should seek ways - either professionally or through continued school - to develop their expertise in areas beyond the traditional.

Correspondingly, as they enter the position, Heads should be as aware as they can be of the many roles that they will play as a school leader. While The Head's Handbook addresses these responsibilities in a brief section, "The Roles of a Head," this chapter is far too brief and only begins to address the many responsibilities and crises that a Head will likely face. NAIS offers other programming, such as its legendary and exemplary "Institute for New Heads," to support new Heads in their role, but developing and revising this section of The Head's Handbook and making crisis management a mainstay of its literature and professional development for new and aspiring Heads would serve them and their schools well.

DISCUSSION AND CONCLUSIONS

As is noted elsewhere, the position of Head of School is difficult, taxing, and complicated, even under the best of conditions. Additionally, the job becomes more complex and demanding with each passing year, as schools have to address thorny issues and, in many cases, address financial and enrollment challenges or shortfalls, making the role of Head of School more akin to a CEO than to a lead teacher. For these and other reasons, as NAIS research has shown, the level of satisfaction that Heads of School find in their jobs is relatively low, and turnover is relatively high, and growing higher. This is obviously of concern to NAIS and its member schools, as schools with higher Head of School turnover are less effective overall and less attractive to current and prospective students and families.

NAIS was understandably concerned that the onset of the COVID-19 pandemic and the accompanying stressors would amplify these issues, perhaps accelerating Head of School turnover and causing even more Heads of School to become disillusioned with their roles. These concerns gave rise to this research, in which we specifically attempt to identify tendencies in the successful management of schools' pandemic responses, thus creating a framework for Heads and schools to address this crisis, but also future crises, for while the pandemic will hopefully end in the relatively near future, there is no doubt that, for every school, another crisis looms. While these crises may be specific to particular schools, rather than universal, as the COVID pandemic was, many schools will continue to experience similar crises - financial, for example - and continue to refine best practices around independent school governance and crisis management is to the benefit of all schools.

Our qualitative and quantitative research, during which we interviewed 8 Heads of School at length and collected rich survey data from over 300 Heads of School and almost 100 Board Chairs, revealed a number of important trends and findings. Perhaps most importantly, the relationship between the Head of School and the Board Chair is among the most significant indicators of success for a Head of School, including during crisis management. Nothing is more important than establishing a relationship between the Head and Chair that is marked by candor, trust, and mutual appreciation. Similarly, Boards must be cognizant of their roles in schools and remain within them, resisting the temptation to become involved in operational issues. As Heads and prospective Heads develop their professional skill sets, there is value in branching out beyond the schoolhouse, so to speak, and seeking education, if not experience, in a variety of areas, including, perhaps, those outside of education and what one might consider traditional paths for an aspiring Head of School. While there is no substitute for experience - and, indeed, experienced Heads of School and Board Chairs generally felt more successful in their pandemic responses - schools, Heads, and Board Chairs should actively engage in developing crisis management protocols.

Just as the impact of the COVID-19 pandemic on independent schools was impossible to predict, for most schools, the next crisis on the horizon is quite possibly one of which they are not currently aware. The most successful schools, however, will take steps to ensure that their leadership is aligned, develop protocols and procedures to deal with the unexpected, seek competent advice and guidance from experts, including those in other fields, and be nimble and forward-thinking, ready to pivot and cope with crisis in a well-informed and prepared fashion whenever the need may arise.

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APPENDICES

i.NAIS: Leadership and Governance COVID-19 Qualtrics Survey

Start of Block: School Information

Q1 What is your position?
Head of School (1)
Board Chair (2)

Display This Question:
If What is your position? = Head of School

Q2 Where is your school located?
East (NJ, NY) (1)
Middle Atlantic (DE, D.C., MD, PA, VA) (2)
Midwest (IL, IN, IA, KY, MI, MN, MO, NE, OH, SD, WV, WI) (3)
New England (CT, ME, MA, NH, RI, VT) (4)
Southeast (AL, FL, GA, MS, NC, SC, TN) (5)
Southwest (AZ, AR, CO, KS, LA, NM, OK, TX) (6)
West (AK, CA, HI, ID, MT, NV, OR, UT, WA, WY) (7)

Display This Question:
If What is your position? = Head of School

Q3 School Type:
PLEASE CHECK ALL THAT APPLY
☐ Elementary (1)
☐ Middle (2)
☐ High (3)
☐ Religiously Affiliated (4)
☐ Secular (5)
☐ Military (6)
☐ Urban (7)
☐ Suburban (8)
☐ Rural (9)
☐ International (10)
☐ Day (enrolling 95% or more day students) (11)
☐ Day-Boarding (enrolling between 51 and 94% day students, with the balance boarding students) (12)
☐ Boarding-Day (enrolling between 51 and 94% boarding students, with the balance day students) (13)
☐ Boarding (enrolling 95% or more boarding students) (14)
☐ Coed (15)
☐ All Girls (16)
☐ All Boys (17)

Q4 School Size
Fewer than 200 full-time students (1)
201-300 full-time students (2)
301-500 full-time students (3)
501-700 full-time students (4)
701-999 full-time students (5)
1000 or more full time-students (6)

End of Block: School Information

Start of Block: Governance Structure

Q5 Please provide the number of voting members on your board from each of the following categories. Please include board members in all categories that may apply.

Additionally, please indicate the total number of voting board members in your answer.
☐ Current Parents (1) _____
☐ Past Parents (2) _____
☐ Grandparents (3) _____
☐ Alumni/ae (4) _____
☐ Faculty (5) _____
☐ Students (6) _____
☐ Other (7) _____
☐ Total Number of Voting Board Members (8) _____

Q6 During the COVID-19 pandemic from March 2020 to September 2020, board members worked appropriately within the boundaries of their role.
Strongly agree (1)
Somewhat agree (2)
Neither agree nor disagree (3)
Somewhat disagree (4)
Strongly disagree (5)

Q7 How much do you agree or disagree with each of the following statements describing how the board as a whole responded to the COVID-19 pandemic?
RATE EACH ITEM LISTED BELOW

Q4 School Size
Fewer than 200 full-time students (1)
201-300 full-time students (2)
301-500 full-time students (3)
501-700 full-time students (4)
701-999 full-time students (5)
1000 or more full time-students (6)

End of Block: School Information

Start of Block: Governance Structure

Q5 Please provide the number of voting members on your board from each of the following categories. Please include board members in all categories that may apply.

Additionally, please indicate the total number of voting board members in your answer.
☐ Current Parents (1) _____
☐ Past Parents (2) _____
☐ Grandparents (3) _____
☐ Alumni/ae (4) _____
☐ Faculty (5) _____
☐ Students (6) _____
☐ Other (7) _____
☐ Total Number of Voting Board Members (8) _____

Q6 During the COVID-19 pandemic from March 2020 to September 2020, board members worked appropriately within the boundaries of their role.
Strongly agree (1)
Somewhat agree (2)
Neither agree nor disagree (3)
Somewhat disagree (4)
Strongly disagree (5)

Q7 How much do you agree or disagree with each of the following statements describing how the board as a whole responded to the COVID-19 pandemic?
RATE EACH ITEM LISTED BELOW

	Strongly agree (23)	Somewhat agree (24)	Neither agree nor disagree (25)	Somewhat disagree (26)	Strongly disagree (27)
Board members used the school's vision and mission to guide strategic planning. (1)					
Board members were committed to resolving internal conflicts in a professional, positive way, allowing progress to be made. (2)					
Board members recognized and responded appropriately to the complexities of the circumstances. (3)					
Board members had the interests of the school in mind during discussions, rather than personal agendas. (4)					
Board members effectively managed criticism from parents and other stakeholders. (5)					

Q8 Board members kept all sensitive information confidential during the COVID-19 pandemic.
Strongly agree (1)
Somewhat agree (2)
Neither agree nor disagree (3)
Somewhat disagree (4)
Strongly disagree (5)

Q9 How much do you agree or disagree with each of the following statements describing how current parents on the board managed the COVID-19 pandemic? If there are no current parents on your board, please skip this question.

RATE EACH ITEM LISTED BELOW

	Strongly agree (1)	Somewhat agree (2)	Neither agree nor disagree (3)	Somewhat disagree (4)	Strongly disagree (5)
Current parents serving on the board did not let their personal agendas impact their work on the board. (1)					
Current parents serving on the board have kept information confidential (2)					
Current parents serving on the board worked within the appropriate boundaries of their role. (3)					

Q10 Please identify any non-board members the board consulted to design protocols and policies in response to the COVID-19 pandemic.

CHECK ALL THAT APPLY
☐ Medical Personnel (1)
☐ Legal Personnel (2)
☐ Human Resource Personnel (3)
☐ Communications/Marketing Personnel (4)
☐ Faculty Members (5)
☐ Members of the Administration (6)
☐ School Nurse (7)
☐ Architect (8)
☐ Other (9) _____
☐ Our board did not consult with any non-board members (10)

Q11 Prior to the COVID-19 pandemic, how often did the board engage in crisis management training?
This training was scheduled when needed (1)
The board did not engage in crisis management training (2)
Once a year (3)
Twice a year (4)
Multiple times a year (5)

Q12 How has the COVID-19 pandemic informed crisis management protocol development at your school?
_____
_____
_____

End of Block: Governance Structure

Start of Block: Head of School/Board Chair Relationships

Q13 How would you describe the partnership between the Head of School and the Board Chair during the COVID-19 pandemic?
Very strong: we have an effective partnership (1)
Somewhat strong: we have an effective partnership in some areas and are still working on others (2)
Not very strong: we are working toward a strong partnership but we are still struggling on many fronts (3)
Not strong at all: our partnership has been a significant challenge (4)

Q14 The Head of School and Board Chair regularly discussed the following topics during COVID-19 response planning.

	Strongly agree (1)	Somewhat agree (2)	Neither agree nor disagree (3)	Somewhat disagree (4)	Strongly disagree (5)
Financial Stability of the School (1)					
Student Enrollment and Retention (2)					
Academic Quality (3)					
Faculty Retention and Support (4)					
The Hiring of New Faculty (5)					
Designing Policy and Protocol for Future Crises (6)					

Q15 When stakeholders approach the Board Chair with COVID-19 concerns, the Board Chair redirects them to the Head of School and notifies the Head of School of the concern.
Strongly agree (1)
Somewhat agree (2)
Neither agree nor disagree (3)
Somewhat disagree (4)
Strongly disagree (5)

Q16 The Head of School has the knowledge and skills necessary to lead the school effectively during the COVID-19 pandemic.
Strongly agree (1)
Somewhat agree (2)
Neither agree nor disagree (3)
Somewhat disagree (4)
Strongly disagree (5)

Q17 The Board Chair has the knowledge and skills necessary to lead the board and support the Head of School effectively during the COVID-19 pandemic.
Strongly agree (1)
Somewhat agree (2)
Neither agree nor disagree (3)
Somewhat disagree (4)
Strongly disagree (5)

Q18 Please share anything about the Board Chair and Head of School relationship that might help us understand how the COVID-19 pandemic impacted school leadership and governance.
_____
_____
_____

Q19 Has the frequency of communication changed between the Head of School and Board Chair during the COVID-19 pandemic?
Yes, we communicate less frequently (1)
Yes, we communicate more frequently (2)
Yes, we communicate far more frequently (3)
No, our communication frequency has stayed constant (4)

Q20 The Head of School and Board Chair regularly discussed the following concerns during COVID-19 response planning.

	Strongly agree (1)	Somewhat agree (2)	Neither agree nor disagree (3)	Somewhat disagree (4)	Strongly disagree (5)
Equity and Access for Students and Families (1)					
Safety and Physical Health of School Employees (2)					
Safety and Physical Health of Students (3)					
Emotional Well-Being of School Employees (4)					
Emotional Well-Being of Students (5)					

End of Block: Head of School/Board Chair Relationships

Start of Block: Occupational Impact
Display This Question:
If What is your position? = Head of School

Q21 How much do you agree or disagree with the following statements?

RATE EACH ITEM LISTED BELOW

	Strongly agree (1)	Somewhat agree (2)	Neither agree nor disagree (3)	Somewhat disagree (4)	Strongly disagree (5)
The COVID-19 pandemic has increased feelings of isolation in my role. (1)					
The COVID-19 pandemic has increased personal feelings of burnout. (2)					
The COVID-19 pandemic has prompted me to work more closely with individuals in peer institutions. (3)					
The COVID-19 pandemic makes me feel capable and innovative as a leader. (4)					
The COVID-19 pandemic has provided opportunities for institutional growth. (5)					

Q22 How has the COVID-19 pandemic impacted the demands placed on your role?

_____

_____

_____

Q23 How much do you agree or disagree with each of the following statements describing how your school responded to the COVID-19 pandemic?

⊞RATE EACH ITEM LISTED BELOW	Strongly agree (1)	Somewhat agree (2)	Neither agree nor disagree (3)	Somewhat disagree (4)	Strongly disagree (5)
We were effective as a school when we moved to distance learning in the spring. (1)					
Our planning over the summer months was collaborative and data-driven. (2)					
Our opening plan this fall was supported by the community and executed well. (3)					
We have been successful in fulfilling our school's mission during the COVID-19 pandemic. (4)					

Q24 Please provide any other information you believe will help inform our research.

_____

_____

_____

End of Block: Occupational Impact

ii.NAIS: Leadership and Governance COVID-19 Interview Protocol
Introduction
Thank you so much for taking the time to speak with me. I appreciate your willingness to share your thoughts and experiences as an Independent School leader during the COVID-19 pandemic.
I am a doctoral candidate at Vanderbilt University. I am specifically interested in understanding how the COVID-19 pandemic has informed and impacted the leadership and governance structures and practices at Independent Schools. We hope to identify the competencies and practices that contribute to effective independent school leadership and governance during a crisis.

All information that is collected in this interview will be treated with respect. Although the final report could potentially be published, you are guaranteed that neither you, nor your school, nor any of its personnel will be identified without your consent.

May I record our session to ensure accuracy, please?

Do you have any questions before we begin?

Conceptual Frameworks

Governance and Leadership Practices during COVID-19; Governance and Leadership Relationship during COVID-19

Governance and Leadership Practices During COVID-19

Questions for Heads of School and Board Chairs

- We are interested in understanding how the COVID-19 pandemic impacted independent school board practice. Could you describe, in broad terms, how the board approached the COVID-19 pandemic?
- The COVID-19 pandemic was unprecedented. How did your board engage in initial steps to design a plan of action?
- Would you please provide a specific example from your experience this year that characterizes the board's response to the pandemic.
- What characteristics of your board before the COVID-19 pandemic (committee structure, meeting frequency, training, compositions), in your opinion, prepared your board to act strategically during this time?
- What structural response or changes, if any, did your board utilize to navigate the COVID-19 pandemic? (new task force committee, a survey to community, consulting firm)
- What financial concerns required your immediate attention, and why?
- How did financial plans and needs evolve throughout the COVID-19 pandemic?
- What life experiences, training, or professional learning prepared you best to lead during the COVID-19 pandemic?
- What training or experiences do you wish you had possessed as you navigated the COVID-19 pandemic?
- Considering your institutional goals and crisis objectives, what were your biggest successes during this time of uncertainty?

Governance and Leadership Relationship During COVID-19

Questions for Heads of School and Board Chairs

- Did you partner with the same Head of School/board chair for the duration of the COVID-19 pandemic?
- Describe your partnership with the Head of School/board chair during the COVID-19 pandemic and how it evolved.
- Please provide a specific example from the COVID-19 pandemic that characterizes the decision-making process you and the Head of School/board chair utilized.
- Hypothetically, if you could go back in time to the Spring of 2020 and change one aspect of your partnership with the Head of School/board chair, what would it be?
- In what ways did the COVID-19 pandemic impact the frequency, content, and modality of your communication with the Head of School/board chair?

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Governance and Leadership Practices During COVID-19
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Governance and Leadership Relationship During COVID-19
Questions for Heads of School and Board Chairs

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- Hypothetically, if you could go back in time to the Spring of 2020 and change one aspect of your partnership with the Head of School/board chair, what would it be?
- In what ways did the COVID-19 pandemic impact the frequency, content, and modality of your communication with the Head of School/board chair?

- How do you think the COVID-19 pandemic will shape future working relationships with the board/Head of School and colleagues?
- Considering lessons learned during the COVID-19 pandemic, what leadership competencies should someone have when considering the job of Head of School?
- Considering lessons learned during the COVID-19 pandemic, what leadership competencies should someone have when considering the job of board chair?
- What have been your most significant sources of insight and support, and guidance during the pandemic?

Closing

Thank you so much for taking the time to speak with me today. I know you are busy, and your time is valuable.

iii. Qualitative Interview Coding Scheme

Table 1		
Coding Scheme		
Category	**Description**	**Example**
Governance and Leadership Practices during COVID-19		
Board Characteristics	Size, composition, demographics, committee structure in response to COVID-19	*"It had as much to do with me kind of just consulting and telling the board, but come summer we realized there really was going to be an active role for the board in deciding whether or not we could even go back. So one of the things that we did, you know, we, like so many schools we formed an advisory a Medical Advisory Panel, we call the map Medical Advisory Panel. That included a former lead board member."* Ben Jag, Creekbend School Head of School
Crisis Management Competencies	Pre-Covid training or experiences that prepared individuals for this crisis.	*You know, I've been fortunate in life I've had a variety of different experiences. And so, I actually was in the Marine Corps for four years right after high school. And, you know, there was an aspect of that that has served me well in a number of ways throughout my career, but I think the, the, the ability to try to understand and navigate a high stress situation, certainly was, was helpful but that's something I*
		learned." Tye Columbus, Head of Green Canyon Country Day

Board Behaviors/Professional Practice	Governance and Leadership entities recognized their role and staying within the boundaries of those roles.	"I mean, it shows a tremendous amount of trust. You know, whether or not that's appropriate from a governance point of view, I suppose we could actually debate. But my board is not really that involved in the operational life of the school. Most of the time, they kind of want to be updated, even though they're overwhelmingly current parents - not entirely - but almost all current parents. They have faith - maybe too much faith - that things are in good hands. And, you know, certainly when there are fundamental decisions, I will consult with the board." John Muck, South Plains Day Head of School
Financial, Academic, Organizational Concerns	Additional unplanned expenses and needs introduced due to COVID-19	"You know, we knew that we would need some additional staffing, whether it was an additional janitorial staff or cleaning throughout the day, or, you know, all of the plastic dividers and shields and things like that and the marking of the hallways." Tye Columbus, Head of Green Canyon Country Day
Governance and Leadership Relationship during COVID-19		
Communication Frequency	Board Chairs and Heads communication varied. Heads and Chairs reported that if they regularly met prior to the pandemic, they maintained that pace during the pandemic.	"I just made a point whenever I would send some sending something out. I sent her a copy ahead of time, she sent one letter to the board, just trying to remember to stay in their lane, which I really appreciate it. [We talked] About the same. She's really busy. I mean, it was COVID-19...I feel bad taking her time." Walker Shue, Head of College Academy
Working Partnership	COVID-19 impact on Head of Shool and Board Chair partnerships and vision for response.	"I've worked with [the Board Chair] very closely now for years. He was co-chair, he's been on the executive committee for years. He co-chaired a taskforce on admissions. So, we have a really good close working relationship, as I said, and this is just sort of anomalous. He was nothing short of overwhelmed." Ben Jag, Creekbend School Head of School
COVID-19 Impact on Head of School Role		
Isolation and Collaboration	COVID-19 informed or contributed to the feelings of isolation or need for collaboration among peer institutions	"And I think there's been a leveling impact in some sense, and then on the flip side of that there are some schools that traditionally struggle, for whom this is an existential threat. Yeah. And so, I think there has been a good esprit de corps for people to kind of share resources and support with each other and guidance. You know, knowing that it's really, it's really hard. I hope you're finding some support as well because, you know, even being a division is different than being the Head of School. It is a lonelier job." John Muck, Head of South Plains Day
Satisfaction in Job	COVID-19 impacted aspects of the job and responsibilities.	"The rate at which we are making high-stakes decisions is exceptionally high and when I talk to my head of school colleagues I know that many are feeling overwhelmed. I anticipate that there will be a lot of head of school turnover in the next 2-3 years...Being where we are on the west coast on-campus schooling is not an option. This exacerbates things because I don't even get the juice of students, and faculty and staff interacting which is really the fruits of the labor."
Responsibilities of Head of School	Challenges introduced during COVID-19 that expanded the needs and responsibilities of the role.	"And I think by taking time out to be innovative and strategic, you're a lot. I think so many times like in crisis people have to like go into the trenches and kind of keep their heads down, but if you can keep your head up and advance instead of retreat, you're going to come out so much further ahead, and that's what my team was willing to do, so it was like from that brainstorming process. You know, we were trying to think of like, you know, how do we keep our dining hall staff employed. And so it was, you know what, let's provide curbside drop off meals from our dining rooms that the community can come to, and, you know, free of charge." Robin Quinn, Head of Walnut Academy