

Designing a Board Formation Program

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Something significant is happening to faith-based schools. While the challenges of attracting students and raising funds are already familiar to governing boards, the biggest risk schools face in the next few years may be underestimating what it takes to preserve their spiritual mission. Non-denominational Christian schools which don't have a church sponsor have dealt with this risk for years, yet it is no less critical for them to respond to this challenge in an intentional way. Catholic schools are generally sponsored either by their local diocese or by a religious order. In a system so dependent on priests and religious, the diminishing numbers have forced both sponsors and their schools to find new ways to assure fidelity to the faith-based mission of the school. Whether your school is a non-denominational, church-sponsored or sponsored by a religious order, it is crystal clear that the responsibility for sustaining the school's religious mission is shifting to the governing board.

On one hand, trustees are already committed to the religious mission of their schools. It's what attracted them to work on the board in the first place. Working with those who serve on boards, I've come to know they don't do it to add a line item to their resume, or to influence the treatment their or their friends' children receive. Some may want to protect the quality of academics or extra-curriculars, but for most, they serve on this board, and not another, because of they have experienced the school's faith-based mission. Because of this, I've found that trustees strongly desire to learn more about that mission and how it plays out in the work of the school, and the work of the board. This is especially true now when they feel more and more responsible for that mission.

This presents a huge challenge. For lay trustees, fully understanding and embracing the school's mission so that they can steward it may seem like an impossible task. As much as they care about it, most of the rest of their lives is not centered around the school's mission. They tend to be professionals and organizational leaders whose success in their day jobs means they are exceptionally busy people. They meet with their colleagues on the board or its committees maybe once a month. And when they do meet, there are often urgencies to deal with that prevent them from spending time with the fundamental issues of mission. To borrow from Stephen Covey, they're too busy cutting wood to stop and sharpen the saw. They rely on the school administration to provide the education they need, but for busy administrators, formation of the board for mission is a task that languishes in the "later" box.

This paper is about how to break through this dilemma, how to ramp up board formation without wasting time and effort, both by trustees or administrators. To find the solution, we need to look at what our schools already do very well to educate hundreds of students who come through our schools every year. They develop a curriculum. Compared to our school curriculum, board formation can be pretty simple, but even a simple curriculum will move schools beyond the hit-and-miss approach they tend to take

toward board formation. We'd never put up with that for our students, and if we want to sustain the mission of our schools, we shouldn't put up with it for our boards either.

Background

First, let's define a couple terms. What do we mean by *formation*? In this context it means the process of learning and embracing a spirituality that gives meaning, language and structure to the work of the faith-based school as well as the personal lives of those who participate. This spirituality is also known as a *charism*. The goal of formation is to help people understand and incorporate into their life and work, the school's *charism*.

What does *charism* mean? A *charism* is a gift from the Holy Spirit. In this context, it is a distinct spirit and tradition that animates a faith-based community and gives it a unique character. It carries a particular manifestation of God's invitation to live in relationship with God and others who share that spirit. St. Paul tells us in First Corinthians that there are many gifts but one Spirit that unites them all. Your school has been given a unique charism and if it is allowed to languish, an important element of God's work in the world will go missing.

People often recognize that there is something compelling about a faith-based school, without understanding the special charism that gives rise to this. An effective formation process makes sure that trustees are fully cognizant of the compelling gift they are nurturing.

Principles of effective board formation

The first principle in designing a board formation program is to **know the outcomes** the school needs. In recent years, through the work of people like Jay McTighe, Ronald Thomas and others, educators have become more aware of the importance of *backward design* of the curriculum for their students. This approach starts with the outcomes desired and works backwards to identify the inputs required to produce those outcomes in students. We need to use this same principle in designing a board formation program. What knowledge, experience and skills do trustees need to govern the school according to its mission and strengthen its charism? Once a school identifies these outcomes, it can design a curriculum that leads to them.

The second principle in designing a board formation program is that **it needs to be sequential**. We would never teach the same lessons to all students in all grades. The curriculum for students in early grades is designed to give them the basics upon which to build in later grades. Eventually they graduate and are replaced by a new cohort of students who are just beginning the process. Our schools also have trustees for a fixed number of years, generally consisting of two terms of three years. Yet most schools provide the same board development opportunities to all trustees at the same time, regardless of their years completed. This means that either important themes have to be repeated each year for the benefit of new members, or they are skipped because the school doesn't want to repeat them for veterans. While some activities bear repeating each year, others should be keyed to trustees' year of service.

The third design principle is that a Board Formation program takes place on **three levels: information, formation and transformation**. Having *information* is important. There are important things to learn

about our school, its history, its religious sponsor and key elements of its theology. But embracing the school's charism requires more than just acquiring knowledge. It also requires *formation*, in which trustees allow the school's charism to seep into and shape their own lives, their ways of thinking and acting. For faith-based schools it means deepening the trustees' relationship with God. Finally it requires *transformation*, in which trustees begin to impact the school and, through the school, the world around them. A well-formed board will help the school engage the culture of the community it serves, reinforcing the good in that culture and courageously challenging its shortcomings when appropriate. *Information* becomes the basis for *formation*, which leads to *transformation*, in both individuals and the world they interact with.

The sequencing and the multi-level approach are illustrated in the chart in Fig. 1.

The fourth principle for designing effective formation for trustees is that the program be **implemented gradually**. Looking at the chart in Fig 1, the potential demands on those leading and participating in the formation program can be seen as taxing, perhaps even unrealistic. It works only if participants both understand how critical formation is to the school's survival and see how it is giving back to them in the form of personal well-being. The strategy is to let them experience this and ask for more. Current members who were recruited with different, and often lower, expectations may have difficulty adjusting. But since the program is sequential, it can be implemented with the new recruits going forward and phased in over time. This makes it easier for both participants and program leaders to ramp up their efforts over time.

This ties into the fifth principle, which is that there be **buy-in from the trustees** themselves. Let them help develop the program and decide how quickly it can be phased in. Have them play meaningful but non-burdensome roles in delivering the program, especially as they move along in it themselves. My experience in doing this was that trustees began pushing the program even further than I thought they would be willing. They themselves shaped a culture of expectation with new recruits following right along.

Finally, for this to work requires a commitment from the school's Chief Administrative Officer (i.e. president, headmaster, principal). This person doesn't need to be an expert in or personally deliver all phases of the program, but he or she needs to not let the ball drop and keep exhorting the board until the program's momentum is established. Once designed, much of the program can be managed by the CAO's administrative assistant, who can schedule meetings, order and distribute materials, and send out reminders giving participants and leaders plenty of notice. Some of this can't be mechanized, but much of it can, and what can should be.

Designing the scope and sequence

Refer to the chart in Fig 1 for an example of what a Scope and Sequence might look like. While this table is generic and can be easily adapted to most boards, some schools may want to dial the extensiveness of the program up or down by adding or deleting elements.

Outcomes

The first step is to identify outcomes. In Figure 1, I have posited an overall outcome that I think would be desired by most schools these days: That trustees can provide governance level leadership necessary to preserve the charism and mission of the school. This outcome can be adapted to individual schools.

Once it is agreed upon, the people designing the program can then identify reasonable outcomes for each year of service that lead to the overall outcomes for the board as a whole. For instance the chart in Figure 1 indicates that the school wants First Year trustees to understand the school's mission, the commitment being asked of them as trustees, the school's relationship with its religious sponsor if there is one, and the basics of the school's underlying spirituality. Each year builds on those outcomes and trustees should be growing in their ability to articulate and incorporate elements of the mission and mentor newer trustees.

Once the outcomes are identified, the design process then identifies methods for achieving them at each of the three levels: Information, Formation and Transformation.

Information

This level requires a great deal on spoken and written *information* because we are trying to engage the mind. For First Year trustees, the process should be seen as beginning with their recruitment. Schools rarely think of this as part of the formation process, but this step is the most crucial for forming expectations and laying a foundation. What is said or not said here can set the trajectory for the potential trustee's terms of service. In their second year, it is suggested that trustees read about the history of the school. Because as schools we know we don't learn anything until we use it, it is suggested that the trustee give a 3-5 minute presentation to the board. This also reinforces that history and its various nuances with the board as a whole and begins the process of cultivating the trustee as a mission spokesperson. A similar strategy is used in ensuing years.

Formation

The *formation* level is more experiential, because at this level we want to engage the heart. In the example there are three activities, highlighted in blue, that are common to every year. The annual retreat, formation during meetings and testimonies from teachers or students are put forth as activities the whole board will experience together. In addition, there are steps asked of trustees in each year related to the *formation* level.

Transformation

At the level of *transformation* trustees are asked to deepen their own practice and participate in activities that further the mission of the school through the board, its students or the broader church. This is where the process goes from the head and heart to the hands. Hands-on activities are placed in given years based on what trustees need, what they are ready for and what else is being asked of them that year. It may be that a given trustee will not be able to participate in an activity designated for that level in that year. The program should be flexible enough that the trustee could defer to a later year, or in some cases do it earlier. One of the challenges of the *transformation* level will be respecting the individual freedom of trustees around spiritual matters. No matter how well thought out our program is, it must leave room for the personal journeys of the trustees and how the Holy Spirit chooses to work with them. The school will want to find a balance between over-regimentation of trustee's experience at one extreme and allowing them to be entirely disconnected from the school's spiritual mission at the other.

Gradually implementing a sequential and multi-level approach, scaled up or down according to the board’s capacity, can prepare the board of a faith-based school to steward the mission of its school and assure that that mission is sustained well into the future.

Figure 1: Board Formation Scope and Sequence Example

Overall outcome: Trustees can provide governance level leadership necessary to preserve the charism and mission of the school.

	First Years...	Second Years...	Third Years...	Fourth Years...	Fifth Years...	Sixth Years...
Outcomes	<ul style="list-style-type: none"> •Understand: School Mission •Understand: Board commitment •Understand: Relationship with sponsor •Understand: basic elements of underlying spirituality 	<ul style="list-style-type: none"> •Can articulate: basic history of school •Can incorporate: basic spirituality of school into Board work. •Can incorporate: if desired, spiritual practice into daily life 	<ul style="list-style-type: none"> •Can articulate: basic history of sponsoring entity •Can articulate: own experience on the Board •Can incorporate: discernment into Board decision-making 	<ul style="list-style-type: none"> •Can articulate: how life of founder tie to schools values •Can articulate: an evaluation of own formation process •Understands: Student formation process •Can assist: in the formation of others 	<ul style="list-style-type: none"> •Can articulate: elements and significance of mission •Can provide leadership: to mission work of Board 	<ul style="list-style-type: none"> •Can serve as a mentor: to new trustees and a resource after leaving Board
Information	<ul style="list-style-type: none"> •Receive: Recruitment presentation •Receive: Welcome Letter from Sponsor •Participate: Board orientation •Read: Basic mission documents 	<ul style="list-style-type: none"> •Read: History of school •Give: 3-5 min presentation to Board 	<ul style="list-style-type: none"> • Read: History of Sponsoring entity • Give: 5-min presentation to Board 	<ul style="list-style-type: none"> • Read: biography of founder/patron • Give: 5-min presentation to Board 	<ul style="list-style-type: none"> • Read: Additional mission-related documents • Give: 5-min presentation to Board 	<ul style="list-style-type: none"> • Read: New documents affecting school mission
Formation	<ul style="list-style-type: none"> •Participate: Annual Board Retreat •Participate: Formation sessions during Board meeting •Receive: Testimonies from faculty/students •Participate: Board pre-sessions •Watch and discuss: pertinent videos •Discuss: Books 	<ul style="list-style-type: none"> • Participate: Annual Board Retreat • Participate: Formation sessions during Board meeting • Receive: Testimonies from faculty/students • Lead: a Board pre-session 	<ul style="list-style-type: none"> •Participate: Annual Board Retreat •Participate: Formation sessions during Board meeting •Receive: Testimonies from faculty/students •Meet: with CAO to assess board experience 	<ul style="list-style-type: none"> • Participate: Annual Board Retreat • Participate: Formation sessions during Board meeting • Receive: Testimonies from faculty/students • Evaluate: Board formation with Mission Effectiveness Committee or Officer 	<ul style="list-style-type: none"> •Participate: Annual Board Retreat •Participate: Formation sessions during Board meeting •Receive: Testimonies from faculty/students 	<ul style="list-style-type: none"> •Participate: Annual Board Retreat •Participate: Formation sessions during Board meeting •Receive: Testimonies from faculty/students
Trans-formation	<ul style="list-style-type: none"> •Attend: Orientation event by sponsor 	<ul style="list-style-type: none"> •Participate: service project •Participate: Overnight retreat/conference given by sponsor •Commit: Daily prayer/Scripture study practice in school's tradition 	<ul style="list-style-type: none"> •Participate: Discernment Training 	<ul style="list-style-type: none"> •Participate: student retreat •Assist: Overnight retreat/conference given by sponsor 	<ul style="list-style-type: none"> •Assist: Annual Board Retreat 	<ul style="list-style-type: none"> • Assist: Annual Board Retreat