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BOARDROOM: ASKING CRITICAL QUESTIONS DURING UNCERTAIN TIMES

Boardroom: Asking Critical Questions During Uncertain Times

Fall 2020

By Jerry Larson



Lately, there have been many questions and few answers. In the independent school world, we wonder if we're overreacting or not acting quickly enough. Will our schools come through the COVID-19 crisis? If they do, what kinds of changes will we need to make? What will our schools look and feel like? How can we prepare for what's ahead amid such uncertainty? This is a time of volatility, uncertainty, complexity, and ambiguity (VUCA).

Trustees and school leaders are considering complicated, multilayered challenges that have been heightened by the pandemic and its continuing fallout—the business model of independent schools is under scrutiny. How do we develop different sources of revenue beyond tuition and fundraising while containing costs and facing increasing requests for tuition assistance from families? With shifting demographics and changing demand for an independent school education, heads, admission officers, and boards must also contend with evolving family expectations and realities, which after COVID-19 might be even more diverse and more demanding.

As the concern for our schools' financial future becomes a leading and urgent priority, trustees may want to jump right to strategic solutions. But now might be the best time to clarify the current

situation before considering solutions or continuing business as usual. Einstein said, “If I had an hour to solve a problem, I’d spend 55 minutes thinking about the problem and five minutes thinking about the solution.” Asking questions to frame the issue, or generative thinking—one of the three modes of governance—often gets short shrift because it’s a different kind of work than fiduciary (the money) or strategic (developing a game plan) governance. Defining what is, what could be, or what might be as we move forward in this VUCA world will help trustees better navigate the new normal, be flexible, and focus on the long term.

Know Your Role

There’s wisdom in developing a synergistic approach to looking at critical issues and situations through a strong partnership with the various stakeholders in our school community. While each of us has experienced some of our new normal with remote learning and financial setbacks, those of us who serve as trustees and are current parents need to be very aware that we are not on the front lines of the school. We need to be mindful, now more than ever, not to blur the boundary between governing and supporting. There is a difference between governance and operations, and while there are gray areas, these boundaries must be acknowledged and respected. Good boundaries lay at the center of a strong partnership between trustees, the head of school, the leadership team, and the school community.

Teachers and school administrators have had to manage an abundance of constituencies, including themselves and their families, during these uncertain times. As trustees and school leaders, we may be struggling with issues of our own, so perhaps our best role will be that of empathetic supporter, governing with a more generative mindset and asking powerful questions before jumping to what we believe the solution might be.

Widening the circle of participants to bring in new perspectives might be one way to best support the school. In talking with different school leaders and reading various news and leadership resources during the pandemic, I’ve realized that we will only find the answers to the complexities we are facing by working together and asking questions from a different perspective. Independent schools need to focus on the board-head partnership—and expand that partnership to truly embrace a collaborative spirit. Through task forces or subcommittees, invite administrators, faculty, parents, and students to bring different voices, ideas, thoughts, and alternatives to the discussion. While you’ll want to handle potentially sensitive issues thoughtfully and carefully, there’s still a need for outside viewpoints, to which boards or administrative teams may be blind.

Asking Critical Questions

The use of questions to advance understanding is not a new concept; it is a time-tested teaching methodology known as the Socratic method. Critical questions can be used to gather and assess different perspectives, develop an understanding of a situation, and thus lead to new ideas and a thoughtful position to begin to develop an action plan. As boards and heads contemplate using this approach to governing and leading, these important principles can guide the work:

- Allow adequate time for a meaningful discussion that will take more than an hour to fully explore; begin by acknowledging that “personal attachments” may arise over the course of the

discussion, such as a trustee's role as a parent or an alumnus or alumna. This will give open space for an engaging conversation.

- Remind those involved that the conversation is confidential, and everyone is welcome to express their own experiences, ideas, perceptions, and thoughts without judgment. This is a “thinking aloud” exercise to gather different points of view and to clarify an issue.
- Be ready to hear and appreciate conflicting statements, allow for disagreement, and encourage participants to stay curious rather than advocate for their position. Ensure everyone's voice is heard and recognized, again without adding judgment.
- Be mindful of time and allow others to ask clarifying questions.
- Be comfortable with silences, and after a few moments ask, “Is there anything else?” and then wait a few moments more.
- Ask critical questions. It offers an excellent opportunity to model civil discourse, with the board chair and head of school leading the way in a collaborative partnership.

Think about how your school is addressing the COVID-19 pandemic. You're likely using critical questions to frame the issues at hand. Some of those questions might be:

- As you think about your own experience in other sectors, or observations of other businesses that have been through marked transitions (Netflix, IBM, Microsoft, Zoom), what ideas or strategies should our school be thinking about? Alternative programs? Different distribution channels (in person, online, hybrid)?
- Is there anything that you have been observing in other segments of education (charter, public, higher ed, corporate) that might have relevance for us?
- What's the crazy idea that you've always wanted to share, or the question you've been reluctant to ask?
- Have we stepped back to ask what it would look like to serve our mission in a very different way?

In thinking about critical questions, the group could also follow Simon Sinek's advice and start with your school's “why” (the school's mission, purpose, or core business) before moving on to “how” the school delivers its “what” (programs and services), which might be more fluid and varied post-pandemic. You might begin with a few powerful questions around your school's three to five vital operational benchmarks.

Keep Learning

The pandemic has taught us each something about ourselves, our work, and the people around us. “What did we learn?” “What worked, and what could we do better?” “How can we use this experience to prepare for the next surprise?” Approaching critical questions with a collaborative, growth mindset instead of from an advocacy position will bring more ideas and thoughts to the table. It will allow boards, leadership teams, faculty, and students to model a way forward and perhaps imagine a different way of doing business in this new normal. Most important, begin by practicing a

more collaborative, distributed model of leadership. Invite new people into the conversation so that your school is prepared for an ever-changing future.

Go Deeper

Throughout this past spring, NAIS released key questions to help school leaders focus on critical and timely aspects of leading their communities through crisis. Many of the topics and associated questions are relevant today. The key questions for planning in uncertain times included board-specific questions, such as:

- What is our current risk assessment?
- How are we acknowledging what governance expert Richard Chait calls the tension between continuity and transformation?
- What do we hope to change?
- What opportunities for innovation is the current situation bringing?

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