

For the following Associations:

Association of Colorado Independent Schools (ACIS), Hawaii Association of Independent Schools (HAIS), Independent Schools Association of the Southwest (ISAS), New York State Association of Independent Schools (NYSAIS), Pennsylvania Association of Independent Schools (PAIS)



2025-26

Ten 1-Hour Webinars

Thursdays | 3–4 p.m. CT / 4–5 p.m. ET

The Trustee Series is a year-long program offering 10 dynamic webinars tailor-made for both trustees and heads which feature governance topics aimed at enhancing the health and efficacy of your board. Two roundtable sessions are included to support both incoming and current board chairs. Don't miss out on this opportunity to elevate your board's performance and impact!

Webinars p. 2–5

- September 18 Independent School Trends Trustees Will Navigate This Year
- October 16 Strategic Financial Planning for Trustees
- November 20 Empowering Independent School Trustees: Current Trends, Culture & Campaigns
- December 11 Board Chair Roundtable I
- January 22 Navigating the Future: Key Trends Impacting Independent Schools
- February 12 Everyday Succession Planning: Resilience for Leadership Transition
- March 5 From the Classroom to Courtroom: Hot Legal Topics & Governance Trends for Trustees
- April 30 The Year Before the Strategic Plan
- May 7 Board Chair Roundtable II: Being the Board Chair Your Board Needs
- May 14 Design Levers for Effective Change

Details p. 5

Webinars will be recorded and available to access until June 30, 2026 unless otherwise noted.

The 2025–26 Trustee Series is sponsored by:



September 18

2025

3–4 p.m. CT

4–5 p.m. ET

Independent School Trends Trustees Will Navigate This Year

Join Debra Wilson, NAIS President, as she highlights and expands on the influences and data directions impacting independent schools.



Presenter: Debra Wilson began her tenure as president of the National Association of Independent Schools (NAIS) in August 2023. Previously, she served as president of the Southern Association of Independent Schools (SAIS). Her SAIS role followed 19 years at NAIS, as assistant director of regulatory affairs and later as general counsel. She has served on several independent school and educational nonprofit boards and co-authored the *NAIS Trustee Handbook (10th & 11th editions)*. Wilson received a BA from Sewanee: The University of the South and a JD from the University of South Carolina.

October 16

2025

3–4 p.m. CT

4–5 p.m. ET

Strategic Financial Planning for Trustees

From an expert in the financial management of independent schools, explore the knowledge, skills, and capacities trustees of independent schools need to ensure their schools will be financial sustainable. During this webinar, we will examine key issues and challenges trustees face as they govern for financial sustainability, and we will also discuss specific strategies and approaches for such work.



Presenter: James P. Honan is a senior lecturer at the Harvard Graduate School of Education. He is also a faculty member at the Harvard Kennedy School and serves on the faculty executive committee of Harvard's Advanced Leadership Initiative. Honan has served as a consultant on strategic planning, governance, and resource allocation to colleges, universities, schools, foundations, and nonprofit organizations. He holds a BA from Marist University, an MA from George Washington University, and an EdM and EdD from Harvard University.

November 20

2025

3–4 p.m. CT

4–5 p.m. ET

Empowering Independent School Trustees: Current Trends, Culture & Campaigns

How are independent schools navigating the evolving philanthropic landscape? Review fundraising trends and their impact on independent schools. Gain practical insights on how boards can effectively contribute to fundraising efforts, from annual funds to capital campaigns, by building a meaningful culture of philanthropy. Learn best practices for leveraging three key fundraising tools as trustees: analyzing the giving landscape, fostering a culture of philanthropy, and preparing for and executing successful campaigns.



Presenter: Maeve Riley is an executive vice president at CCS Fundraising. With over a decade of experience, Riley has guided organizations on development initiatives ranging from \$4 million to \$1 billion. She specializes in prospective funder landscaping, principal and major gift strategies, sustainable growth plans, strategic faculty involvement, and parent and alumni engagement. Prior to CCS, she served as the director of alumni relations at Rush University Medical Center in Chicago and led an educational program for a youth development agency.



Presenter: Bob Weston serves as senior vice president and independent schools practice lead at CCS Fundraising, with three decades in the independent school sector. An educator, administrator, and advancement professional, Weston has directed transformative fundraising initiatives—from \$5 million to over \$100 million—and advised on strategic planning, endowment growth, and donor engagement. His expertise and understanding of independent school values have elevated philanthropic outcomes and advanced institutional missions nationwide.

BONUS WEBINAR

December 11

2025

3–4 p.m. CT

4–5 p.m. ET

Board Chair Roundtable I

For current & incoming board chairs only.

This session will not be recorded.

Join us for a facilitated conversation on the issues confronting board chairs. Peluchowski and Rogen invite your participation to share and hear from peers.



Presenter: Georgy Ann Peluchowski is a partner at Greenwich Leadership Partners with decades of experience in financial services, nonprofit board service, strategic planning, organization design, enterprise risk management, and independent school leadership. Within her 12-year tenure as a trustee at the Latin School of Chicago, she served as board chair, treasurer, and chair of the finance committee. Currently, she co-chairs Latin's Senior Advisory Council and serves on the boards of the Independent School Chairperson's Association and High Jump Chicago.



Presenter: Stephanie Rogen, principal and founder of Greenwich Leadership Partners, is a consultant, coach, and facilitator to educational and nonprofit boards and leaders. Rogen works with nonprofits ranging from Columbia University to The White House Project and Northwell Health and is a guest lecturer at the UPenn Graduate School of Education. She is a trustee for College Unbound and has served on the boards of the HTH Graduate School of Education, Blair Academy, St. Luke's School, Year Up, and the Greenwich United Way.

January 22

2026

3–4 p.m. CT

4–5 p.m. ET

Navigating the Future:**Key Trends Impacting Independent Schools**

This webinar will explore the key trends reshaping the landscape of independent education—from economic shifts and demographic changes to evolving admissions strategies, philanthropy, workforce dynamics, and the head-board relationship. Designed specifically for trustees, this session will equip you with timely insights and practical knowledge to help your institution navigate change and lead with confidence.



Presenter: Amada Torres is the vice president of studies, insights, and research at the National Association of Independent Schools (NAIS) where she researches and reports on market and socioeconomic trends, governance and leadership, community well-being, diversity, and other studies of interest to NAIS schools. As a contributor to the *NAIS Trendbook*, she speaks on issues and trends related to independent education, financial sustainability, admissions and marketing, and advocacy. Torres serves as a trustee of Keys School, Tessa International School, and the Association of Independent School Admission Professionals.

February 12

2026

3–4 p.m. CT

4–5 p.m. ET

**Everyday Succession Planning:
Resilience for Leadership Transition***This session will not be recorded.*

Boards that deliberately and continuously succession plan are prepared and ready for transitions because they have a firm handle on the leadership capabilities needed for a thriving organization. However, we believe succession planning is perhaps the most underdeveloped muscle in school governance. Join us for a discussion of approaches and practices to everyday succession planning.

Presenters: Georgy Ann Peluchowski, Greenwich Leadership Partners (see bio above)
Stephanie Rogen, Greenwich Leadership Partners (see bio above)

March 5**2026**

3–4 p.m. CT

4–5 p.m. ET

From the Classroom to Courtroom: Hot Legal Topics & Governance Trends for Trustees

Drawing on industry research and real-world experiences, Mann will share insights from her work with independent schools nationwide on governance, leadership development, legal education, and risk and crisis management. From enrollment agreement pitfalls to leadership successes, this webinar provides a platform for exploring critical issues, sharing strategies, and fostering community learning to equip schools for the road ahead.



Presenter: Megan Mann launched Approach in 2024, drawing on over 17 years working in the legal, nonprofit and education sectors. Her work focuses on administrative and governance leadership levels as well as faculty professional development. Previously the general counsel and vice president of legal education and support at the National Association of Independent Schools (NAIS) she managed intricate legal, crisis, and risk management matters, providing valuable consultation and educational support to member schools. She is an independent school alum, parent, and trustee.

April 30**2026**

3–4 p.m. CT

4–5 p.m. ET

The Year Before the Strategic Plan

How can trustees and heads anticipate beginning a strategic plan—before the planning starts? This session is for the year(s) before strategic planning—as you assess your school’s readiness for strategic work, wrangle with the complexities of timing, build shared understanding with your community, and frame the questions that will matter for the future. We’ll consider five critical conversations to have before ever reaching out to prospective consultants—or deciding to go it alone.



Presenter: Greg Bamford is a co-founder and partner of Leadership+Design. Previously he was associate head of school for strategy and innovation at Charles Wright Academy and head of school at Watershed School. In addition, Bamford recently completed two terms on the board of his alma mater, The Overlake School. He brings a strategic lens to leadership development, innovation, and change management. Bamford has been a speaker at conferences, and his writing has appeared in publications such as *Independent School*, *Net Assets*, and *The Yield*.

BONUS WEBINAR**May 7****2026**

3–4 p.m. CT

4–5 p.m. ET

Board Chair Roundtable II: Being the Board Chair Your Board Needs

For current & incoming board chairs only.

This session will not be recorded.

As board chair, you bring to the role unique background, skills, and experiences that you hope (fingers crossed!) will help you lead your board well. Sometimes, we find ourselves facing unexpected or unusual circumstances for which we may feel wholly unprepared. How can you, as chair, step back to recognize what your board needs from you during those times? And what can you do to equip yourself to meet those needs?



Presenter: Lynn Wendell has worked as a consultant for well over 150 independent schools and nonprofits. She served as a trustee at three independent schools and as board chair at San Francisco University High School. In addition, she is currently co-chair of the program committee and on the executive committee of Independent Schools Chairpersons Association (ISCA). She has served on nonprofit boards, board committees, and advisory councils.

May 14
2026

3-4 p.m. CT
4-5 p.m. ET

Design Levers for Effective Change

Trustees are charged with driving strategic change. Yet any school's history will include successful change initiatives and others that failed to thrive. This session examines stages of change and levers leaders can apply when implementing strategic changes. We'll explore how to examine the environment and community readiness for change as well as the groundwork needed prior to getting started. Learn, as change unfolds, how to monitor successes and barriers. Even as the new status is accepted and established, how does that new status become the foundation for further growth?



Presenter: Antonio Viva is a partner at Leadership+Design. He is a seasoned educator, experience designer, strategic advisor, and nonprofit leader. He served as the head of school at Walnut Hill School for the Arts for 12 years. He also served as senior research and design associate for the Education Development Center, Inc. where he worked on national school design projects. Previously, he was the executive director of Artisans Asylum in Boston, MA, one of the oldest and largest makerspaces in the US. He holds undergraduate and graduate degrees from Union College in English and Education respectively.

details

Series Registration Fee *(Fee covers entire board & head of school for all 11 webinars)*

\$600 per school for members of the following associations:

- Association of Colorado Independent Schools (ACIS)
- Hawaii Association of Independent Schools (HAIS)
- Independent Schools Association of the Southwest (ISAS)
- New York State Association of Independent Schools (NYSAIS)
- Pennsylvania Association of Independent Schools (PAIS)

Please note: *There are no refunds for the Trustee Series.*

Register for
the Trustee
Series through your
Association &
receive the ISACS
member rate.

Zoom Pre-registration

All trustees & heads who plan to attend the live presentation or access the recordings & resources MUST have a Zoom account (free or paid) and complete the Zoom pre-registration form to receive their event ticket (individual URL).

The Association's specific Zoom pre-registration link and instructions will be emailed to the registered school contact prior to the first webinar to be shared with the school's head & trustees. Prior to each webinar, the Association you registered through may send reminder emails to the registered school contact with additional details.

Recording Access

Webinars will be recorded and available to registered schools until June 30, 2026.

The February 12 webinar and the Board Chair Roundtables (December 11 & May 7) will not be recorded.

***Only one registration per school
is needed for your school to receive
access to the entire Trustee Series.***

*Please have ONE designated contact
person register for your school.*

Questions? Contact your Association directly.