

Heads, Trustees, & CFO's Conference January 15-17, 2025 | Pinehurst Resort

WEDNESDAY, JANUARY 15, 2025

9:30am NCAIS Board Meeting | Centennial Boardroom

12:00pm NCAIS Board and New NCAIS Heads Lunch | Carolina Vista Lounge |
Sponsored by Southstate Bank

1:30pm Governance Workshop | Marc Frankel, Triangle Associates | Grand Ballroom
Governing during Challenging Times Panel with NCAIS School Trustees | David Shuford,
Charlotte Latin School; Tommy Shores, Asheville School; LeeAnn Harris, Gaston Day School

4:00pm Break | Conference Center Hallway

4:15pm Breakout Sessions | Select One

Built To Last | Chuck Gilliam, ASCI | Cardinal Ballroom

This session will offer a brief update on the Christian education movement in the US along with strategic practices related to sustainable leadership. Gleaned from a survey of leaders across the country, the session will unpack these strategies and offer biblical wisdom on enduring the challenges associated with school leadership.

The Connection Between Your School's Strategic Plan and Philanthropy | Phil Higginson, ISM | Tufts Room

Does this sound familiar? Your school's board has just approved an exciting – yet ambitious – strategic plan. Yet, the operating budget is insufficient to pay for all the desired programs, facilities, and initiatives. How, then, to turn these dreams into reality? The answer lies with philanthropy. This interactive session will explore how to translate your strategic plan into fundraising priorities. We will discuss how to identify the right type of fundraising effort for each element of your plan and how to develop a philanthropic menu of items to share with prospective donors. You'll gain an understanding of the link between strategic plans, master plans, and endowment master plans. In addition, you'll have the chance to immediately put what you learn to work as you engage in a strategic conversation with a colleague.

Intentional Innovation: Ideas...Implementation...Impact | Matt Scully, Director of Digital Integration and Innovation at Providence Day School | Ross Room

The challenge for school leaders is managing increasing complexity in a world of uncertainty. This session will seek to explore how emerging technologies can align with our mission-driven initiatives to leverage opportunities and potentially manage our risks.

- 5:30pm Reception | Conference Center Hallway | Sponsored by Critical Response Group
- 6:15pm Dinner & Program | Grand Ballroom | Sponsored by Marsh McLennan Agency, UNUM Insurance & Selective Insurance
NCAIS Legislative Updates | Dave Horne and Josh Grant, Smith Anderson
- Guest Speaker - Dr. Brett Jacobsen, SAIS

THURSDAY, JANUARY 16, 2025

- 6:30am Breakfast for Hotel Guests | Carolina Dining Room
- 8:00am Registration | Conference Center Foyer
- 8:30am **President's Welcome** & Opening Remarks | Eric Bradley | Grand Ballroom
- 8:45am Independent School Trends | Debra Wilson, NAIS | Grand Ballroom
- 9:45am Break | Conference Center Hallway | Sponsored by Truist Bank
- 10:00am **How To Change Anyone's Mind: Could There Be a Better Way? | Jonah Berger, Author and Wharton Professor | Grand Ballroom**
Everyone has something they want to change. Employees want to change their boss' mind and leaders want to transform organizations. Politicians want to change policy, startups want to revolutionize industries, and nonprofits want to change the world. But change is hard. We push and push, but often nothing happens. Could there be a better way? This talk introduces a revolutionary approach to change. Successful change isn't about pushing harder or exerting more energy. It's about removing barriers. Overcoming resistance by reducing friction and lowering the hurdles to action. Discover the five hidden factors that impede change and how, by mitigating them, you can change anything.
- 11:00am Break

11:15 am

Strengthening the Head-Board Partnership for Effective Crisis Communication | Penny Abrahams, ISM | Grand Ballroom

Effective communication during a crisis is crucial to maintaining safety, trust, and confidence within a school community. This session focuses on the vital partnership between school heads and board members in helping to develop and execute a robust crisis communication strategy that includes preparedness and practice. Participants will explore key strategies for navigating crisis communication, including creating a comprehensive crisis communication plan, defining clear roles and responsibilities, leveraging multiple communication channels, and maintaining transparency and timeliness in messaging. Using case studies of “real world” scenarios, this session will equip School Heads and Board members with tools to foster a strong, proactive head-board partnership to ensure their school community remains informed and reassured in times of uncertainty.

Learning Objectives:

- Understand the collaborative roles of heads and board members in crisis communication.
- Develop skills to co-create clear, concise, and coordinated crisis messages.
- Gain insights into maintaining a transparent and unified front during a crisis.
- Apply the principles of effective crisis communication to “real world” case studies.

12:30pm

Heads Lunch & Business Meeting | South Room

Trustees and CFOs Lunch | Carolina Dining Room

1:00-4:00pm

Coaching Corner | Crystal Room, Carolina Dining Room

Have a dilemma and want to brainstorm solutions with a certified Thought Partner? Pop in for a one-on-one with an executive coach.

1:30pm

Strengthening the Head-Board Partnership for Effective Crisis Communication | Penny Abrahams, ISM, continued | Grand Ballroom

2:30pm

Break | Conference Center Hallway | Sponsored by Landmark Builders

2:45pm

Breakout Sessions | Select One

School Choice in NC: Reading the Crystal Ball | Stephanie Keaney, NCAIS & Beverly Fowler, Salisbury Academy | Oakley Room

This session will offer a brief overview of the history of school choice in North Carolina and, given the changing makeup of the government in Raleigh, the possible paths the programs could take in the future. We will then have a roundtable discussion for schools to think through the financial implications of this program, especially as small and mid-sized schools

become more financially dependent upon the State underwriting a portion of the tuition for parents who might otherwise choose a public or charter school.

Turning The Board into a Fundraising Machine | Chris Dudley, AdvancementEDU | Callaway Room

Join Chris Dudley, founder of AdvancementEDU and former chief of staff and senior vice president for development at High Point University, for an inspiring and practical program designed for heads of schools and their board members. This session will equip leadership with the strategies and tools needed to activate board members to raise more money and expand their network of influence for the benefit of the school. Whether you're looking to enhance your existing fundraising efforts or seeking new ways to galvanize your board, this program is your gateway to creating a thriving circle of influence and support for your school.

The Airing of Grievances: Things auditors and clients each do to make the audit more difficult | Jim Fries and Bethany Holman, Brown Edwards | Olmsted Room

Join us for an engaging and candid discussion where we delve into the common challenges that arise during the audit process. This session will explore the key grievances on both sides—what auditors wish clients understood and what clients feel is frustrating about auditors' approaches. We'll identify specific actions and behaviors that can complicate the audit experience, from miscommunication and documentation issues to unrealistic timelines and unclear expectations. By airing these grievances, we aim to foster a better understanding and collaboration between auditors and clients, ultimately leading to smoother audits and stronger partnerships. Bring your stories, insights, and questions as we work towards solutions together!

3:45pm Head of School: Break
All Other Guests: Adjourn

4:00pm Wine & Wisdoms: Female Heads of School | Villa Parlor
Bourbon & Blunders: Male Heads of School | Carolina Vista Lounge

6:00pm Dinner on your own

7:30-9:00 pm After Hours Social | Carolina Vista Lounge | Sponsored by Lexington Independents

FRIDAY, JANUARY 17, 2025

6:30am Breakfast for Hotel Guests | Carolina Dining Room

9:00am

Leadership Matrix Model | Michelle Bostian | Grand Ballroom (Ross/Tufts)

This session provides independent school heads with strategies to excel within complex matrixed organizational structures. As traditional hierarchical frameworks evolve into matrixed models, providing greater clarity around the scope of roles becomes crucial for effectiveness. Participants will explore key principles of leadership adaptability, fostering collaboration, and cultivating autonomy, with a focus on how clear role definitions contribute to the success of matrixed frameworks. By integrating insights on managing diverse leadership styles and promoting a collaborative culture while establishing clear boundaries and expectations, school leaders will develop the skills needed to thrive in matrixed environments.

10:30am

Break | Conference Center Hallway

10:45am

Leadership Matrix, Continued

12:00pm

Adjourn

*Discounted golf pricing is available to NCAIS conference attendees on Friday afternoon.
Call reservations to set your tee time.*