

## Priorities in Board Development

by Peter Baur, Westminster Academy

When consulting with boards, I begin with an illustration. Imagine a line that begins with a plateau and slopes down to a valley. Along the side of the slope, I draw a boulder. Below the boulder, I draw a stick figure

“lose its way” because of major, obvious changes or decisions—as stated above, the changes often come from “good ideas” that inch the entity (school) away from its calling. After many of these good decisions, horrified, someone

successful college athlete myself (oh, so many years ago!) value all that athletics brings to the table. Let me also say that without predetermined, strong parameters and protections in place, the “good idea” of athletics can be a culprit for diluting a school’s mission and vision. Its specific mention here reflects anecdotes from schools for which this has been the exact case.

One school of the two schools mentioned above, at the risk of losing its enrollment, stayed in a decaying section of the city of Philadelphia rather than accept an offer to move to an up-and-coming part of town with acres of land. Their mission and vision required that they stay. They are a Quaker school who understood part of their calling was *to* the city. The “good idea” to move would have moved them from part of their core for existing. Many good ideas—“Well, we can still take kids to the city,” for example—were offered, but their clear core and committed missional board won the day. They have continued to thrive and have embraced the city around them. As a result, they have one of the most powerful community involvement programs in the nation and their graduates are distinct in their understanding of the issues faced by cities. Having a clear understanding of where the stake is on the side of the hill gives you the freedom to say “no” and particularly to “good” ideas.

Why begin an article on the role of the board in development talking about the critical need to remain committed to your mission and vision? Because all of us are aware of how easily compromises can be made when money is involved. Our firm commitments can become rather pliable when we

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gamely positioned under the boulder holding it up. I use this to illustrate the primary function of a board. The boulder represents the school’s mission and vision and once the position of that boulder has been established, a “stake” is driven in the hill and the board’s job is to hold it there. Anyone who has shared the responsibility of participating on a “mission-driven” board, and in particular one in which the mission involves swimming against the current of present culture, understands why the boulder is on the side of the hill. Holding to a specific mission in these circumstances is hard work; gravity (present-day culture, expectation of parents, and sometimes, even a “good idea”) pulls the boulder to the bottom of the hill. Without the constant (constant!) energy given to holding the boulder in place it is likely it (mission and vision) will slowly creep to the bottom, and (most) often as the result of one good idea after another. You see, rarely does a mission-driven entity

realizes the amount of distance the boulder has actually fallen from its original place . . . and few boulders are likely to be pushed back up the hill. At this point the decision becomes whether to begin another school that will not “lose its way.”

I have worked in independent school education for over thirty years and also began a non-profit educational program to support disadvantaged students. I have sat on numerous boards. The main independent schools (two over 150 years old) for which I worked were highly successful in bringing resources to their programs to support their work, but each has had different outcomes for maintaining the integrity of their mission. They both understood the strategic core of what they offered and needed to maintain, but one found the good idea of a bigger athletic program (and the donors it could bring) chipped away at one of their core principles. Let me emphatically state that I am not opposed to strong, successful athletic programs and as a

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find ourselves in financial hardship or being offered something that doesn't "necessarily" compromise our mission, but suddenly is re-categorized as an "enhancement" to our program that will attract more families—or keep some from leaving. This is not to say that the understanding of how our mission and our vision is lived out may not mature over time, but it must be clarified what it is that *truly* makes your school classical and Christian and it must be understood where that stake is on the side of the hill. Any "maturing" that brings changes should be intentional, thoughtful, careful, part of a larger plan and not a compromise on the mission and vision. The role of any board in development *must* begin with the development of the board. The board is responsible to see to the overall welfare and success of the school and does so by first protecting the vision and mission of the school, but is also responsible for fiduciary oversight, establishing overall policy, and hiring and evaluating the head of school. Board members must be properly engaged over the mission and vision of the school and fully buy into it before being asked to serve and must understand their primary role is to protect the integrity of the model of education to which that school is committed. *The point to be made here is that given the particular and unique mission of classical Christian schools, the most important component of developing a necessary and strong fundraising (development) role for the board is to identify board members who share a passion for the model of education and then to take the time and energy to properly train those board members so their commitment to the model is not compromised by*

*pragmatism, personal agendas, or an inability to say "no" to good ideas.*

Before going any further, let me unequivocally interject here that the first priority in board service is finding board members who are godly, wise, and humble.

If you have been around new entities, you may have heard of the transition from a "founding" board to a "strategic" board. I believe this to be a real and necessary part of the maturing of any entity. It does not mean that founders shouldn't serve on strategic boards, but it means that board attention moves from how do we get this thing up and running and out of being involved in the day-to-day activities of the school, to what strategies do we need to employ that create the best opportunity for long term success and the most robust expression of our mission and vision—or how do we strategically move to excellence in all areas of the school. Consider that just as schools seek to hire administrators, teachers, and staff, *strategically* knowing the ultimate long-term desired outcome should dictate the hiring. This is done through identifying the roles and responsibilities that are needed to best carry out the mission and vision of the school in the day-to-day operation of the school and classroom experience. So must the board identify the roles and responsibilities of board members with a strategic mindset. One of those key strategic roles is the ability to engage resources that will allow the school to thrive. This may sound like a nod to pragmatism, but making sure pragmatism does not drive decisions is the issue. Things must get done and engaging the proper resources—people who have particular skills and abilities—is appropriate. Crucial

is understanding that at the board level the strategic roles have far greater ability to influence permanent and significant change than at any other level. This simply underlines that when boards are moving to a strategic composition, the commitment to find individuals who are committed to the model of education is paramount, and intentional, detailed training in what that means and looks like is also critical. Note! If the current board is not clear on and able to articulate their model of classical Christian education, then there is more important work to be done before emphasizing development and fundraising. As a test, hand each board member a sheet of paper and ask them to delineate the three most distinct aspects of the school's classical Christian education and cite an example. If you come up with as many different answers as there are board members, you are in trouble. Where many boards fail as they move to an active, strategic, fundraising component is placing the dollars (personally or via networks) an individual may bring to the table over the individual's understanding of and commitment to the mission and vision of the school that (potential) board member has. Often the idea is that if that person doesn't fully buy in, the other board members will provide the necessary balance. Whoops! There goes another inch down the slope.

So, a strategic board must include individuals who understand the need for fundraising at the board level as a strategy for assisting the school in reaching the fullest expression of its mission and vision. (Note: "fullest expression" includes paying faculty, staff, and

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administrators well, providing the teachers what they need in terms of program material and training, and it also includes working toward facilities that are a representation of those things that are good, virtuous, *and* beautiful.) As important as having board members who understand the nature and importance for development are the strategic implications of seeking board members of means themselves. These should be willing to access their networks in a way that gives the greatest opportunities for bringing financial resources to the school, to strengthen the mission and vision, and not just “good ideas” that may move the boulder down the slope. Let me reiterate here that these individuals must be asked to participate on the board *not* because they can bring resources to the school, but because they have a passion for what the school is doing and as a result of strategic thinking are also people of means. Consider that most boards will try to include a lawyer, builder, accountant, educator, PR expert, and individuals with business experience because they bring experience and or expertise to the board that will assist the school in helping it most effectively reach its mission and vision at a certain point in time. They too, should first be chosen because of their commitment to protecting the mission and vision, but their expertise and experience provides added value to the board’s ability to serve the school well.

Given this broader perspective, let me jump to some very practical board principles as they relate to development:

1. As the governing body of the school, the board should understand it sets an example for

all others who will be approached to contribute to the school. Therefore, every board member should give sacrificially to the school. Foundations and often other donors want to specifically know what percent of the board has given because they understand this reflects appropriate leadership.

2. Board members should set an example as the leaders of the school by being the first to give or pledge each year.

3. Each board member should actively engage those in their networks to raise awareness of their school. This is true for both fundraising and admission.

4. There should be individuals on strategic boards who are able to and can willingly, enthusiastically, and actively engage people of means to hear the school’s story.

5. All board members should be willing to learn from those board members (see #4) who understand how to engage the hearts, souls, and minds of others over the mission and vision of the school and should be willing to learn how to ask those individuals if they would be able to support the school financially. The board should be continually growing in its ability and understanding in how to bring resources to the school.

6. A director of development will always have a limited sphere of influence and therefore will rely on the board to make introductions to their networks to broaden the pool of potential donors. This is good strategy. The director of development, along with the head of school, should assist in establishing a plan for the board’s fundraising efforts above and beyond the efforts of the director of development and head of school. For some boards, this involves establishing

a development committee.

In conclusion, a well-functioning board thoughtfully and consistently seeks to advance its understanding of how best to serve the needs of the school for both the short and long term. Most important is maintaining a clear and “permanent” commitment to the core principles of the school’s mission and vision. This needn’t hinder (it should actually motivate) the board’s ability to engage people at the board level who can enhance the school’s ability to attract strong financial support for the school’s mission and vision.

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