



# 2016

## PROFESSIONAL DEVELOPMENT OPPORTUNITIES

**ism**<sup>®</sup>



Summer  
Institute

Advancement  
Academy

Business and  
Operations  
Academy

21st Annual  
Heads Retreat

School-Year  
Workshops

# Set your goals, rev your skills, choose your path

## ► 2016 Line Up

### Summer Institute

**June 19th through July 20 // EARLY BIRD: APRIL 15**

Our summer workshop series features sessions for every school position, ranging from nuts-and-bolts introductory courses for new administrators to a deep dive in job-specific, topic-driven programs. When not in class, network with fellow attendees during ISM keynotes and lunches featuring “topic tables” with ISM Consultants and other attendees.

### School-Year Workshops

**Fall and Winter of 2016–17**

Spread throughout the academic year, our School-Year Workshops give administrators the opportunity to take popular workshops they may have missed during the summer. Workshop topics include admission, enrollment management, summer programming, diversity, strategic financial planning, and scheduling.

## THE ACADEMIES

Seasoned administrators will thrive at these week-long, intensive experiences, designed to break silos and promote impactful, mission-driven change to better serve school communities. Each participant or team will be paired with a mentor who will offer guidance in topic session selection and assistance crafting the school’s capstone action plan to be presented at week’s end for peer review.

**BRING  
YOUR  
TEAM**

### The Advancement Academy

**July 25–29 // EARLY BIRD: APRIL 15**

*Designed for Admission, Development, and Marketing Communications Officers, as well as School Heads, and any other administrators involved with their school’s advancement planning*

### The Business and Operations Academy

**October 16–20 // EARLY BIRD: JULY 15**

*Best suited for Business Managers, HR Directors, CEOs, and Operations and Facilities Managers*

### 21st Annual Heads Retreat

**November 2–5**

Relax, recharge, and return to your school fresh with new ideas and insights from this topic-driven retreat, limited to 24 participants to maximize engagement. This year’s retreat will center on personal, professional, and schoolwide wellness, featuring the results of ISM’s latest research connecting the Head’s well-being to the school’s culture and performance.



**We guarantee your satisfaction.**

ISM believes in providing quality and excellence in our workshops, and in ensuring the satisfaction of everyone who attends. If you are not satisfied with your workshop for any reason, ISM will credit the tuition you paid toward another similarly priced workshop or refund your tuition up to 100%



According to the class of 2015:

Our workshops were rated **4.6 stars** out of **5** on average for **overall benefit, content, relevance/ applicability, engagement, networking, and resources.**

“*ISM provides excellent professional development opportunities and I enthusiastically encourage my faculty and staff to attend your Summer Institute and Webinars. I have taken advantage of many of your offerings and always return to my school with both theory and practice to enhance my education and experience. Thank you for all that you do to further our field!*”

Dr. Tekakwitha M. Pernambuco-Wise  
Head of School  
Sea Crest School, CA

**93.7%**

of participants said they would likely recommend our workshops to a colleague.

Forge ahead in your career through exclusive learning programs, structured to mentor and guide private-independent school leaders like you **at every stage** of your professional journey.

Be sure of your direction and certain of your purpose. Find fresh perspectives on familiar problems and design personalized action plans to implement immediately.

#### Participants receive:

- All workshop materials, accessible only through ISM professional development courses
- Expert guidance from industry leaders and experienced ISM Consultants
- Outstanding networking opportunities

#### All opportunities offer:

- Experienced workshop leaders
- Research-based content
- Networking opportunities to share issues, ideas, and solutions
- Action plans you develop with your school in mind
- Practical resources and tools

**Join us and discover new ways of doing things.**  
Visit [isminc.com](http://isminc.com) or call 302-656-4944

# BRING YOUR TEAM

“I was blessed to attend with my new Vice Principal and it was wonderful for her to learn alongside me. I highly recommend leadership teams attend this workshop together.”

Marcy Nicklas, *Principal, Lower School*  
Liberty Christian School, TX

When two or three administrators or faculty leaders attend together, they **share the learning experience, start action plans,** and **present the information and content more easily** when they return to their schools.

*Get special team pricing on select offerings!*

## 3 WAYS TO save

### GOLD MEMBER PRICING

Members save 15% off nonmember pricing. Visit [isminc.com/consortium](http://isminc.com/consortium) to learn more about member benefits.

### EARLY BIRD PRICING

Register now and lock in your Early Bird pricing: April 15th for Summer Institute courses and the Advancement Academy and July 15th for the Business and Operations Academy.

### SPECIAL TEAM PRICING

Select workshops are ideal for teams! Check out the descriptions online for special deals! Call to register at 302-656-4944.

## General Information

ISM Free Resources	9
Webinars	17
Workshop Leader Bios	38
International Advancement Certification Program (IACP)	40
Business Certification Program (BCP)	44
Bookstore	48
Registration Information	50

## Board Member Training

<b>NEW TO POSITION:</b>	
The Board Presidency	8
<b>TOPIC FOCUSED:</b>	
Strategic Financial Planning: Skills and Implementation (SI)	8
Preparing for a Blockbuster Capital Campaign	9
Strategic Financial Planning: Skills and Implementation (SYW)	37

## School Head Training

<b>NEW TO POSITION:</b>	
The New Head of School	10
<b>TOPIC FOCUSED:</b>	
The Assistant Headship	10
Just for Heads: Marketing and Enrollment Management for the New Educational Paradigm	11
Strategic Financial Planning: Skills and Implementation (SI)	11
Evaluation, Compensation, and All Things HR for Independent Schools	12
The Double-Edged Sword of Diversity (SI)	12
Preparing for a Blockbuster Capital Campaign	13
Teaching Excellence II: A Growth-Based Process	13
The Vital Role of the Executive Assistant	14
Bring a Strengths-Based Approach to Your School's Advisory Program	14
2016 Head's Retreat	15
The Double-Edged Sword of Diversity (SYW)	36
Strategic Financial Planning: Skills and Implementation (SYW)	37

## Business Professional Training

<b>NEW TO POSITION:</b>	
Effective Business and Operations Leadership: The First Five Years	16
<b>TOPIC FOCUSED:</b>	
Strategic Financial Planning: Skills and Implementation (SI)	16
Evaluation, Compensation, and All Things HR for Independent Schools	17
The Well-Kept Campus: Strategies for the Facilities Manager	18
Financial Aid: Challenging Situations and Policies to Address Them	18
Strategic Financial Planning: Skills and Implementation (SYW)	37
<b>EXPERIENCED:</b>	
Business and Operations Academy 2016	45

## Advancement Professional Training

<b>NEW TO POSITION:</b>	
The New Admission Director (SI)	20
The New Development Director	20
The New Marketing Communications Director	21
The New Admission Director (SYW)	35
<b>TOPIC FOCUSED:</b>	
Your Annual Fund From A to Z	22
Annual Fund Writing Clinic	22
Millennials to Boomers: Marketing to a Multigenerational Audience	23
Preparing for a Blockbuster Capital Campaign	23
Mastering Enrollment Management (SYW)	35
<b>EXPERIENCED:</b>	
Mastering Enrollment Management (SI)	21
Advancement Academy 2016	41

## Academic Professional Training

<b>NEW TO POSITION:</b>	
Chairing Your Department: The First Five Years	24
Directing the Athletic and PE Programs	25
Balance Your Roles as Upper School Dean of Students	26
Leading the Effective Upper School	26
Leading the Effective Middle School	27
Leading the Effective Lower School	27
The New Grade Level Dean	28
The New Middle School Dean of Students	28
<b>EXPERIENCED:</b>	
Experienced Division Leaders Symposium	29
Transformative Academic Leadership: Fostering a Growth-Focused and Student-Centered Culture	29
<b>TOPIC FOCUSED:</b>	
The Assistant Headship	24
Train Your Faculty in Blended and Personalized Learning	30
Double-Edged Sword of Diversity (SI)	30
Hands-on Advisory: Curriculum, Themes, and Activities	31
Bring a Strengths-Based Approach to Your School's Advisory Program	31
Student-Centered Scheduling (SI)	32
Scheduling the Elementary School Program	32
Teaching Excellence II: A Growth-Based Process	33
Evaluation, Compensation, and All Things HR for Independent Schools	33
Build Your Summer Program Into a Measurable Asset (SYW)	36
Double-Edged Sword of Diversity (SYW)	36
Student-Centered Scheduling (SYW)	37

Visit [isminc.com/workshops](http://isminc.com/workshops) to register or call us at 302-656-4944.

SI= Summer Institute • SYW= School-Year Workshop



### New in your position

Get the foundational skills you need to jump-start your career.

*These courses are ideal for professionals with **up to three years** of experience in their field.*



### Experienced practitioner

Gain focused insights to handle the intricacies of your profession with finesse.

*Experienced courses are ideal for professionals with **three or more** years experience in their field.*



### Topic Focused

Charge into specific topics with your peers to review, research, and learn proven techniques and strategies.



*Our Home Base!*

## Wilmington, Delaware

*"In the middle of it all"*

Wilmington, Delaware, is awesome. Seriously. Tax-free shopping is just the start. We have a vibrant waterfront (where you will be staying and learning for Wilmington workshops), great parks, culture, and festivals (you have to check out the annual jazz festival happening June 21–25). Longwood Gardens is one of the area's best attractions. "Wyeth Country" of Chadds Ford is here too—right down the road in neighboring Pennsylvania.

Don't forget about the **Wilmington Blue Rocks**, whose home field is right next to Summer Institute's home. If you're lucky, you might even get a visit from Rocky while attending Summer Institute.

Extra time while you are here? You are just under two hours from two of the best beaches on the East coast—**Rehoboth Beach** and **Dewey Beach**—where you can also find tax-free outlet shopping. More of a city person? Take a quick train ride to **Philadelphia** and/or take a ride (under two hours) to **New York City** or **Washington, DC!**



## #we're trending

**Twitter** Brian @bboubel

Enjoying another great meal with some great people at the conference. #ISMNCsi15 Jul 16 2015

**Twitter** Kimberly Clarkson @ClarksonMFS

Missing the smiling/goofy faces of my ISM MS family today! #ISMNCsi15 Aug 11 2015

**Twitter** Carey Gates @cngates

Great times in Wilmington, DE! #ismincsi2015 Jul 21 2015

**Twitter** Kelley Hunter Sexton @kelley\_sexton

Great first day at ISM Summer Institute training Wilmington, DE. Looking forward to tomorrow. #ISMNCsi15 Jul 8 2015

**Twitter** Colleen Sullivan @csully1121

#ismincsi15 Making new friends at ism inc! Jun 26 2015

**Twitter** Sparty @SpartyGastonDay

Wonderful dinner and opening session @isminc #ismincsi15 Jul 12 2015

Thank you to everyone who tweeted or shared your ISM experience in 2015. Let's keep it going in 2016! Tweet at us @isminc using the hashtag #ISMNCsi16.

### FOLLOW US

**Twitter** @isminc

**Facebook** ISMfanpage

**YouTube** indschmgt

**LinkedIn** Independent School Management

 NEW TO POSITION

 EXPERIENCED

 TOPIC FOCUSED



# Summer Institute

**JUNE 19–JULY 20 • WILMINGTON, DELAWARE**

The Chase Center on the Riverfront & the Westin Wilmington

**Reserve your spot today!**

Register at [isminc.com/workshops](https://isminc.com/workshops) or call us at **302-656-4944**.

Due to the personalized nature of our courses, we must limit registration to 24 per course on a first-come, first-served basis. Many fill quickly, so we recommend you reserve your spot as soon as possible with a \$600 refundable deposit.

 #ISMINCsi16 Join the conversation.



for Board Chairs and Members

## The Board Presidency *weekend workshop*

July 9–10 | 20 IACP CREDITS [isminc.com/iacp](http://isminc.com/iacp)

Led by: Walker Buckalew, PhD • 29th year leading  
Executive Consultant, ISM

### NEW TO POSITION

*New Board Presidents, Chairs of the Committee on Trustees and other key Board-committee leaders, and School Heads all should attend this workshop.*

The decisions that a Board makes today will be felt both immediately and years from now. As Board President, you understand this, and you're always looking for the best ways to keep your school viable and sustainable through both the good times and the bad. This workshop will help you survive now and thrive in the years to come by giving you access to leadership, assessment, and planning strategies developed through ISM's work with Boards at hundreds of private-independent schools.

### Takeaways

- A clear set of guidelines for leading your Board, both in terms of long-range Board-building and in terms of the routine of running effective Board meetings
- A framework for making your committee structure more rational and effective
- An approach to evaluating and supporting your School Head
- New formats for conducting strategic planning on a regular cycle with your Board members and senior administration

### Tuition Information

Gold Member: \$1,548 // \$1,393 Early Bird or free with 10 Consortium Credits

Nonmember: \$1,821 // \$1,639 Early Bird

“This workshop gave me much-needed tools to take leadership of the Board this year. Walker is a gifted and wise facilitator.”

Melanie Heartfield, Board Chair  
All Saints Episcopal School, TX

## Strategic Financial Planning: Skills and Implementation

July 6–8 | 20 IACP/20 BCP CREDITS [isminc.com/iacp](http://isminc.com/iacp) | [isminc.com/bcp](http://isminc.com/bcp)

Led by: Walker Buckalew, PhD • 29th year leading  
Executive Consultant, ISM

### TOPIC FOCUSED

*New and veteran Board Presidents, Chairs of the Finance Committee and other key Board-committee leaders, School Heads, Business Managers, and other senior administrators should attend this workshop.*

Increased cash reserves. Higher enrollment levels. Long-term viability. These are the goals at every school—and they are attainable, if you have the right strategic financial plan. ISM's proven approach to strategic financial planning will help you experience financial success now, while positioning your school strongly for the future.

### Takeaways

- ISM's 13-line format for organizing your highest-impact, strategic numbers into a user-friendly progression intelligible to all your Board members and senior administrators
- Your self-scoring on the 18 ISM Stability Markers™, and a clear sense of what that score implies for your school's future
- ISM's system for constructing a strategic plan/strategic financial plan to serve as your six-year framework for operations and operations finance

### Tuition Information

Gold Member: \$1,548 // \$1,393 Early Bird or free with 10 Consortium Credits

Nonmember: \$1,821 // \$1,639 Early Bird

**Bring your team!** Pay only \$1,114 for each additional team member attending with you. Call 302-656-4944 to register.

“This workshop was outstanding—the presentation so rational, clear, and practical. I feel empowered to move my school forward. I believe if we use these tools, we shall position our school to be successful again in the future. For myself, the tools provide me with a roadmap for mission-centered planning.”

Mary Anne Vigliante, Head of School  
Academy of the Holy Names, NY



YOU MIGHT ALSO BE INTERESTED IN:

### The ISM Strategic Board Series at [isminc.com/bookstore](http://isminc.com/bookstore)

Trustees armed with this series will be prepared to function in a manner that will improve and solidify your school's viability. Ensure that your Trustees are using the same language and working from the same game plan. Buy the entire series for your Board members and make a significant investment in your Board's education, new Trustee orientation, and Board effectiveness.

For more information visit page 49 of this catalog.



# Preparing for a Blockbuster Capital Campaign

July 6–9 | [30 IACP CREDITS](#) [isminc.com/iacp](http://isminc.com/iacp)

Led by: Herbert P. Soles, CFRE, IAP-L • **10th year leading Adjunct Consultant, ISM | Assistant Headmaster for Development, Norfolk Academy, VA**

Paula Schwartz, EdD, IAP-L • **13th year leading Senior Consultant, ISM**

## TOPIC FOCUSED

*Development Directors, aspiring Directors, Heads, Trustees, and Development Committee members should attend this workshop.*

“If you fail to plan, you plan to fail”—and that adage is never truer than when you’re preparing for a capital campaign. Before you can chart the next steps of your campaign’s course, you have to know where you currently stand, as well as your school’s assets and obstacles. This workshop covers surefire strategies to fully prepare for a successful campaign, motivate and engage your supporters, and create an inspirational and sustainable vision for future endeavors.

## Takeaways

- Place a capital campaign into your current development programming
- Review the pros and cons of a capital campaign and its impact on the school community, annual giving, donors, and prospects
- Focus your school’s philanthropic approach to gain better long-term community support
- Define leadership roles, create job descriptions, and set up a volunteer organization
- Understand the roles of strategic planning, assessing your development program, conducting a feasibility study, and allocating resources

## Tuition Information

**Gold Member:** \$2,314 // **\$2,083 Early Bird** or free with 10 Consortium Credits

**Nonmember:** \$2,722 // **\$2,450 Early Bird**

**Bring your team!** Pay only \$1,671 tuition for each additional team member attending with you. Call 302-656-4944 to register.

**““** *I feel so encouraged and excited about the fact that we have so much potential to raise bigger dollars. We just needed to figure out the process for doing it. There is a lot to do, but I am excited about the next steps!”*

Anna Johnson, *Head of School*  
The Wolf School, RI



## ISM Resources & Subscriptions

*Keeping you connected, informed, and inspired—wherever, whenever*

[e-Letters](#) | [e-Lists](#) | [Research](#) | [Quick Tips Podcasts](#) | [Social Sharing](#)

### Monthly Position-Specific Newsletters

[isminc.com/eletters](http://isminc.com/eletters)

The Source, ISM’s monthly e-letter is your source for staying connected, current, and on-point. We publish eight position-specific newsletters a month, covering such topics as personal health tips, financial aid news, social media marketing strategies, changes to federal laws, energy-saving tips, ISM research updates ... we could go on and on.

### Daily Guidance, ISM e-Lists

[isminc.com/elist](http://isminc.com/elist)

Sometimes the best place to turn for advice is your peers. Share problems, offer solutions, get advice, and discuss growing concerns for your position with colleagues at private-independent schools worldwide, right from your inbox.

### Insight Anytime, Social Networking

 [www.youtube.com/user/IndSchMgt](http://www.youtube.com/user/IndSchMgt)

 [linkedin.com/company/independentschoolmanagement](http://linkedin.com/company/independentschoolmanagement)

 [facebook.com/ismfanpage](http://facebook.com/ismfanpage)

 [@isminc](https://twitter.com/isminc)

### Research Center

[isminc.com/research](http://isminc.com/research)





for School Heads

## The New Head of School

July 6–9 | 30 IACP CREDITS [isminc.com/iacp](http://isminc.com/iacp)

Led by: Terry L. Moore, BCP-E • 14th year leading  
Executive Consultant, ISM

Susan B. Lair, PhD • 2nd year leading  
Head of School, St. Francis Episcopal Day School, TX

### NEW TO POSITION

First-time School Heads will benefit from this workshop.

Learn what is expected of you in your new role as Head of School and how to better manage the complexities of your responsibilities through proven ISM strategies, principles, and disciplines for success that have served Heads for more than 40 years.

Count on this workshop to strengthen your leadership skills and train you to build a powerful team, prioritize your responsibilities, and make the most of every minute and every dollar.

### Takeaways

- Examine what is expected of you, your tasks, and your relationships with all members of the school community
- Analyze your school in a new way, with its mission as a guide
- Understand leadership through strategic planning
- Develop your Management Team
- Realize the costs of excellence, and set your tuition accordingly
- Learn with a group of individuals in the same situation, tackling similar issues, in class and during quality networking time
- Maintain your personal health and vitality

### Tuition Information

Gold Member: \$2,314 // \$2,083 Early Bird or free with 10 Consortium Credits

Nonmember: \$2,722 // \$2,450 Early Bird

“The caliber of expertise both Terry and Susan provided was impressive and instructive. I leave with new ideas, tools, and connections. Additionally, I very much appreciate the frameworks and processes that can really improve our practices—helping to make us more professional and efficient in our work as a school.”

Jason Flom, Director  
Cornerstone Learning Community, FL

## The Assistant Headship

July 6–9

Led by: Bryan Smyth, PhD • 3rd year leading  
Consultant, ISM

Bill Shelnutt • 1st year leading  
Head of School, St. Luke School, GA



### TOPIC FOCUSED

This workshop is geared for both new Assistant Heads and Assistant Heads looking to step-up their school leadership skills.

As Assistant Head, you juggle a multitude of tasks, interact with a variety of constituencies, and act as the leader when the Head is unavailable. However, while other school leadership positions have job descriptions that are nearly identical across the all independent schools, the Assistant Head's job description is highly varied and can even change significantly year-to-year.

As a result, this role requires flexibility, confidence, people skills, and a wide working knowledge of school operations. In this workshop, you will gain a fresh perspective on performing your critical support functions, while drilling down on a key issues to help you develop into more complete school leader and ultimately assist the School Heads in leading the school in effective ways.

### Takeaways

- A deeper understanding of your role as Assistant Head
- Key management strategies that are critical to enhancing your school's stability and ability to carry out its mission
- Ways to maximize your relationship with the School Head
- Candid conversations with a current School Head—learn what is it that School Heads really want from you
- Plans to implement for next year

### Tuition Information

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Nonmember: \$2,722 // \$2,450 Early Bird

“I will work more intentionally with the Head and I find time for lunch, etc. I loved the question ‘What do you want me to do’ vs. ‘What do you need me to do?’”

Peter Reinke, Assistant Head of School  
The Buckley School, CA

## Just for Heads: Marketing and Enrollment Management for the New Educational Paradigm



July 6–9 | **30 IACP CREDITS** [isminc.com/iacp](http://isminc.com/iacp)

Led by: Amy Riley, IAP-S • **5th year leading**  
Consultant and Academic Dean of IACP, ISM

### TOPIC FOCUSED

*School Heads who seek to fill their schools to capacity with a marketing and enrollment management strategy that is laser-focused on teaching and learning to maximize students' and parents' experience of your school should attend this workshop.*

Discover the power of a 360° marketing and enrollment-management approach that brings together members of your academic, admission, development, and marketing communications leadership team to craft an integrated recruitment and re-recruitment strategy that inspires families to make the long-term enrollment and philanthropic commitments you seek.

### Takeaways

- Discover the implications of the full-circle approach to marketing and enrollment management—(recruitment and re-recruitment)—from parents' perspectives and ISM's research
- Understand the connection between your recruitment and re-recruitment strategies and your school's philanthropic giving campaigns
- Define and lead your school's marketing and enrollment efforts by bringing the right people together to craft an integrated approach
- Delve into the compelling question: Who is responsible for the re-recruitment of current families?
- Understand the resources you need and the metrics for success which prove initiatives' return on investment (ROI)
- Return with methods that will help you lead your team effectively and achieve the results you need to sustain your school's mission into the future

### Tuition Information

Gold Member: \$2,314 // **\$2,083 Early Bird** or free with 10 Consortium Credits  
Nonmember: \$2,722 // **\$2,450 Early Bird**

*"I am impressed with how the staff at ISM uses current research and best practices to provide practical solutions to the challenges school leaders face."*

Dr. Brian Dougherty, *Headmaster*  
Sherwood Christian Academy, GA

## Strategic Financial Planning: Skills and Implementation

July 6–8 | **20 IACP/20 BCP CREDITS** [isminc.com/iacp](http://isminc.com/iacp) | [isminc.com/bcp](http://isminc.com/bcp)

Led by: Walker Buckalew, PhD • **29th year leading**  
Executive Consultant, ISM

### TOPIC FOCUSED

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- ISM's system for constructing a strategic plan/strategic financial plan to serve as your six-year framework for operations and operations finance

### Tuition Information

Gold Member: \$1,548 // **\$1,393 Early Bird** or free with 10 Consortium Credits  
Nonmember: \$1,821 // **\$1,639 Early Bird**

*Bring your team! Pay only \$1,114 for each additional team member attending with you. Call 302-656-4944 to register.*

*"Walker's knowledge of the subject and ability to communicate with the class made for a superior experience."*

Dr. Joan B. Hill, *Head of School*  
The Lamplighter School, TX

we're **trending**

**Kimberly Clarkson (@ClarksonMFS)**

Networking and enjoying good company ...  
Hawaii, Michigan, and New Jersey represented  
at #ISMINCsi15 **Jul 14 2015**





for School Heads

## Evaluation, Compensation, and All Things HR for Independent Schools

July 17–20 | 30 BCP CREDITS [isminc.com/bcp](http://isminc.com/bcp)

Led by: Terry L. Moore, BCP-E • 14th year leading  
Executive Consultant, ISM

### TOPIC FOCUSED

Both new and experienced School Heads, Division Heads, Department Chairs, Academic Deans, or anyone responsible for faculty evaluation should attend. This workshop is especially useful for teams!

Creating a faculty culture of expectation—clearly defined and vigorously pursued—can be overwhelming. In this workshop, you will learn ISM’s three-step Purposes and Outcomes process for setting clear expectations for your entire community. Once we understand and articulate expectations, then creating an evaluation and compensation system to support faculty easily follows.

We’ll also review the legal aspects of HR, giving you a working understanding of the critical aspects of managing faculty. Finally, we’ll cover the hiring induction process, making sure you understand the complete HR life cycle. You’ll leave the workshop with tools to create your own evaluation system, and enough information to decide how to change your compensation structure—if it must change at all.

### Takeaways

- Increased understanding of the HR life cycle
- Tie your mission statement to faculty evaluation
- Sample evaluation tools
- Hiring and induction processes
- Knowledge for implementing a merit-based pay system
- A step-by-step guide to change your evaluation and compensation structures

### Tuition Information

Gold Member: \$2,314 // \$2,083 Early Bird or free with 10 Consortium Credits

Nonmember: \$2,722 // \$2,450 Early Bird

**Bring your team!** Pay only \$1,671 for each additional team member attending with you. Call 302-656-4944 to register.

“This was my first ISM workshop. I have a new found respect for the organization and eagerly await another opportunity to participate in an ISM event.”

Juanita Nell, Head of Preschool/Kindergarten  
Moorestown Holy Trinity Episcopal Day School, MD

## The Double-Edged Sword of Diversity: Reframing Community Life Initiatives in Independent Schools

June 26–28

Led by: Derrick Gay • 2nd year leading  
Educational Consultant

### TOPIC FOCUSED

Anyone interested in fostering a more inclusive independent school community is welcome in this workshop.

The word “diversity” is often ill-defined, represents a divisive identity, and can create a well-meaning—but unhelpful—“savior” mindset. This workshop facilitates participant-driven reflection and discussion on individual and institutional assumptions, beliefs, attitudes, and behaviors. Finishing this workshop will set your school on the path toward a more inclusive school community.

### Takeaways

- Get concrete resources to inform articulating your vision around diversity and inclusion
- Learn proven, effective community-building practices in other independent schools
- Begin to assess your school’s needs and potential resources to realize your community goals
- Learn more about your own identity and how you perceive others—insights that foster an inclusive environment
- Join networks of other independent school educators to reflect on these issues of community life

### Tuition Information

Gold Member: \$1,548 // \$1,393 Early Bird or free with 10 Consortium Credits

Nonmember: \$1,821 // \$1,639 Early Bird

**Bring your team!** This workshop is ideal for teams of faculty/faculty leaders learning together. Pay only \$1,114 for each additional team member. Call 302-656-4944 to register.

“I gained a great amount of information in and around the topic of diversity and inclusivity. The focus on the single story and normalizing identity, along with the discussion of microaggressions, had a profound impact on me. I found myself beginning to look at the conversation through a whole different lens. It opened my eyes to the narrative of others and the importance of understanding the narrative.”

David Kirkland, Upper School Division Head  
Valley School of Ligonier, PA

## Preparing for a Blockbuster Capital Campaign

July 6–9 | **30 IACP CREDITS** [isminc.com/iacp](http://isminc.com/iacp)

Led by: Herbert P. Soles, IAP-L • **10th year leading**  
Adjunct Consultant, ISM | Assistant Headmaster for  
Development, Norfolk Academy, VA

Paula Schwartz, EdD, IAP-L • **13th year leading**  
Senior Consultant, ISM

### TOPIC FOCUSED

Development Directors, aspiring Directors, Heads, Trustees, and Development Committee members should attend this workshop.

“If you fail to plan, you plan to fail”—and that adage is never more true than when you’re preparing for a capital campaign. Before you can chart the next steps of your campaign’s course, you have to know where you currently stand, as well as your school’s assets and obstacles. This workshop covers surefire strategies to fully prepare for a successful campaign, motivate and engage your supporters, and create an inspirational and sustainable vision for future endeavors.

### Takeaways


- Place a capital campaign into your current development programming
- Review the pros and cons of a capital campaign and its impact on the school community, annual giving, donors, and prospects
- Focus your school’s philanthropic approach to gain better long-term community support
- Define leadership roles, create job descriptions, and set up a volunteer organization
- Understand the roles of strategic planning, assessing your development program, conducting a feasibility study, and allocating resources

### Tuition Information

Member: \$2,314 // **\$2,083 Early Bird** or free with 10 Consortium Credits

Nonmember: \$2,722 // **\$2,450 Early Bird**

**Bring your team!** Pay only \$1,671 tuition for each additional team member attending with you. Call 302-656-4944 to register.

 *I am so grateful for being able to bring back so many great ideas from ISM to my Advancement Team, and excited that many things have already been implemented and are benefiting Kinkaid this year.”*

Blair Burke Foster,  
Assistant Manager, Kinkaid Fund & Building Together  
The Kinkaid School, TX

## Teaching Excellence II: Developing Your Faculty Culture

July 10–12

Led by: Walker Buckalew, PhD • **29th year leading**  
Executive Consultant, ISM

### TOPIC FOCUSED

School Heads, Division Heads, Department Chairs, and others who hold leadership positions with the faculty, and teachers should attend this workshop.

Based on ISM’s Student Experience Study and the seminal Model Schools Project, this workshop outlines how to use key assessment instruments for lifelong faculty professional growth and development, all designed to enhance the student experience. You return with a copy of the *Teaching Excellence II* workbook, as well as practice in using the four instruments that it provides.

### Takeaways


- The *Teaching Excellence II* workbook, which includes the Faculty Experience Survey, the Faculty Culture Profile II, the Student Experience Profile II, and the Mission Application Plan (MAP)
- Hands-on experience in using and integrating all four instruments
- A clear understanding of a professional-growth-based faculty evaluation system’s effect on students
- Strategies to create a small teacher unit to assist in the application of the system and in the interpretation of the data that it generates

### Tuition Information

Gold Member: \$1,548 // **\$1,393 Early Bird** or free with 10 Consortium Credits

Nonmember: \$1,821 // **\$1,639 Early Bird**

**Bring your team!** Pay only \$1,114 for each additional participant from your school. Call 302-656-4944 to register.

 *Teaching Excellence II was a highlight of my summer. I feel much more knowledgeable and prepared to work with my school’s teaching staff in guiding their professional growth with the research shared to support the information we received. The flexibility allowed in using the survey tools and incorporating them in our situation is so helpful, since seldom does a ‘one-size-fits-all’ approach to anything in education work effectively.”*

Nancy Webb, Head of Lower School  
Nansemond-Suffolk Academy, VA





for School Heads

## The Vital Role of the Executive Assistant

July 6–9

Led by: Darlene Caraway • 23rd year leading  
Assistant to the Head, Greenhill School, TX

### TOPIC FOCUSED

*This workshop has been especially designed for Executive Assistants of various experience levels. Assistants to School Heads; Assistants to Division Heads; Assistants to Directors of Admission, Advancement, and CFO; and receptionists (must have at least one year experience in a support staff position) are welcome to attend.*

As an Executive Assistant or Administrative Support staffer, you represent the face and voice of your school. You are generally the first contact with potential parents, and work with all constituencies throughout the school year. This workshop will help you be your best—soar to new heights and exceed expectations!

### Takeaways

- Techniques to increase your “circle of influence”
- Newfound self-confidence/esteem
- Know what to say, when it counts
- Incorporating technology for efficiency
- A network of colleagues
- An action plan to set you on a new course immediately after the workshop!

### Tuition Information

Gold Member: \$2,314 // \$2,083 Early Bird or free with 10 Consortium Credits

Nonmember: \$2,722 // \$2,450 Early Bird

“The networking alone was worth the travel. The room was filled with spectacular people who all do my job. I appreciate the time we had to ask each other questions. We spent evenings together, still sharing what we do and how we do it. The class of 2015 is already talking about a reunion!! Thank you!”

Cathy Guertin, Executive Assistant to the Head of School  
Burgundy Farm Country Day School, VA

## Bring a Strengths-Based Approach to Your School’s Advisory Program

June 30 | 8am–4pm

Led by: Roger Dillow • 9th year leading  
Adjunct Consultant, ISM

### TOPIC FOCUSED

*Best suited for Heads and Assistant Heads of Middle and Upper School divisions, Deans of Students, and Grade-Level Advisory team leaders. Individual advisor practitioners and others who support quality of student life (Chaplains, Counselors, Diversity Coordinators, Admission Directors) will benefit, as well.*

Go beyond “clinical advising” and instructional group advisory to focus on helping advisees identify, cultivate, use, and find joy in their distinguishing, individual “signature strengths.”

Drawing on research by ISM and from the broad and growing field of positive psychology, this intensive, one-day workshop covers the foundational principles and key practices in implementing a positive, strengths-based approach in this important student guidance and support program.

### Takeaways

- A solid understanding of the distinctive benefits of the advisor as a “positive coach”
- A plan for starting the year in a strengths-based direction with colleagues, advisees, and their parents
- Positive coaching skills and tools to use with individual advisees and advisory groups
- Access to pertinent resources and a network of positive coaching peers
- Professional renewal through a better understanding of your own strengths as an educator

### Tuition Information

Gold Member: \$1,032 // \$929 Early Bird

Nonmember: \$1,214 // \$1,093 Early Bird

*Stay for this workshop after any workshops between June 26–29th—for only an additional \$790 tuition! Call 302-656-4944 to register.*

“My overall experience was fantastic. I could not have left feeling any more informed. The atmosphere was open to questions, comments, sharing, and concerns. Worth every dollar.”

Amy Jenner, Head of School  
Thomas Hart Academy, SC



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for Business Officers and Facility Managers

## Effective Business and Operations Leadership: The First Five Years

June 19–25

Led by: Terry L. Moore, BCP-E • 14th year leading  
Executive Consultant, ISM

Toni Swan, BCP-E • 15th year leading  
Adjunct Consultant, ISM | Director of Operations and  
Finance, Athens Academy, GA

### NEW TO POSITION

Business Managers, Controllers, and Business Officers new to their positions or new to private-independent schools, with beginning or intermediate accounting experience, should attend this workshop.

Business Managers in private-independent schools are increasingly coming from all professional walks—for-profit industry, other nonprofits, public accounting, and military leaders often find an enjoyable workplace in independent schools. Understanding private school culture and the necessary professional aspects you must master will help you be successful your first five years. Join us in this workshop for those new to business management in independent schools.

### Takeaways

- An understanding of how your school's mission, culture, and educational focus impact the Business Office
- Time-tested, best practices for school finance and operations to support your school's viability and strategic growth
- A professional network that serves as your support and sounding board for years to come

### Tuition Information

Gold Member: \$4,371 // \$3,934 Early Bird or free with 20 Consortium Credits  
Nonmember: \$5,142 // \$4,628 Early Bird

“Awesome course! Everything was valuable—I am new in my role and new to this industry, so the course was perfect timing and very beneficial.”

Emily Stovall, Director of Finance and Operations  
San Jose Episcopal Day School, FL

## Strategic Financial Planning: Skills and Implementation

July 6–8 | 20 IACP/20 BCP CREDITS [isminc.com/iacp](http://isminc.com/iacp) | [isminc.com/bcp](http://isminc.com/bcp)

Led by: Walker Buckalew, PhD • 29th year leading  
Executive Consultant, ISM

### TOPIC FOCUSED

New and veteran Board Presidents, Chairs of the Finance Committee and other key Board-committee leaders, Heads of School, Business Managers, and other senior administrators should attend this workshop.

Increased cash reserves. Higher enrollment levels. Long-term viability. These are the goals at every school—and they are attainable, if you have the right strategic financial plan. ISM's proven approach to strategic financial planning will help you experience financial success now, while positioning your school strongly for the future.

### Takeaways

- ISM's 13-line format for organizing your highest-impact, strategic numbers into a user-friendly progression intelligible to all your Board members and senior administrators
- Your self-scoring on the 18 ISM Stability Markers™, and a clear sense of what that score implies for your school's future
- ISM's system for constructing a strategic plan/strategic financial plan to serve as your six-year framework for operations and operations finance

### Tuition Information

Gold Member: \$1,548 // \$1,393 Early Bird or free with 10 Consortium Credits  
Nonmember: \$1,821 // \$1,639 Early Bird

Bring your team! Pay only \$1,114 for each additional team member attending with you. Call 302-656-4944 to register.

“This workshop was much broader than I expected. In 1.5 days, I expected to focus mainly on the Strategic Financial Plan. It was incredibly helpful to get a much broader presentation, in addition to spending all of the time we needed on the SFP.”

Michal Allaire, Chief Financial Officer  
The Northwest School, WA

**Are you an experienced Business Officer?** Check out page 45 for more information on our Business and Operations Academy!



# Evaluation, Compensation, and All Things HR for Independent Schools

July 17–20 | 30 BCP CREDITS [isminc.com/bcp](http://isminc.com/bcp)

Led by: Terry L. Moore, BCP-E • 14th year leading  
Executive Consultant, ISM

## TOPIC FOCUSED

Both new and experienced School Heads, Division Heads, Department Chairs, Academic Deans, or anyone responsible for faculty evaluation should attend. This workshop is especially useful for teams!

Highly engaged teachers benefit your school in every way, we all know that. But actually creating a culture of expectation—clearly defined and vigorously perused—can be overwhelming. In this dynamic workshop, you will learn ISM's three-step Purposes and Outcomes process for setting clear expectations for your entire community. Once we understand and articulate expectations, then creating an evaluation and compensation system to support faculty easily follows.

We'll also review the legal aspects of HR, giving you a working understanding of the critical aspects of managing faculty. Finally, we'll cover the hiring induction process, making sure you understand the complete HR life cycle. You'll leave the workshop with tools to create your own evaluation system, and enough information to decide how to change your compensation structure—and whether it must change at all.

## Takeaways

- Increased understanding of the HR life cycle
- Tie your mission statement to faculty evaluation
- Sample evaluation tools
- Hiring and induction processes
- Knowledge for implementing a merit-based pay system
- A step-by-step guide to change your evaluation and compensation structures

## Tuition Information

Gold Member: \$2,314 // \$2,083 Early Bird or free with 10 Consortium Credits

Nonmember: \$2,722 // \$2,450 Early Bird

**Bring your team!** Pay only \$1,671 for each additional team member attending with you. Call 302-656-4944 to register.

“I feel like I saw best practices in action and really appreciate the quality of the resources shared. Additionally, I like the work that we did on faculty culture. The lens of predictability and support provides a great viewpoint. Finally, just getting time to pick one another's brains on a host of topics was really helpful.”

Prentice Stabler, Head of Upper School  
Franklin Road Academy, TN

#ISMINCwebinars

# Webinars

Take advantage of the convenience of online learning. Visit [isminc.com/elearning](http://isminc.com/elearning) to view the latest offerings.

All live Webinars are held from 3pm–4pm ET on their scheduled days. Participants also receive a recorded copy of the webinar.

## Tuition Information

Gold Member: \$127 (per computer) Nonmember: \$136 (per computer)

April

- 6 Teach Faculty How to Market\*  
*Amy P. Riley, IAP-S, ISM Consultant  
Academic Dean, ISM International Advancement Certification Program*
- 13 21 Impact Steps to Strengthen Your School's Advisory Program  
*Roger Dillow, MA, MSW, ISM Adjunct Consultant*
- 20 Annual Fund Cabinet: Peer-to-Peer Cultivation\*  
*Paula A. Schwartz, EdD, IAP-L, ISM Senior Consultant  
Co-Convener, Advancement Academy*

May

- 4 How To Craft a Mission-Driven Annual Fund Appeal\*  
*Paula A. Schwartz, EdD, IAP-L, ISM Senior Consultant  
Co-Convener, Advancement Academy*
- 11 Changing Paradigms, Changing Schedules—Hints on How to Make Change Happen  
*Bryan Smyth, PhD, ISM Consultant*
- 18 Two Predictors of Development Success\*  
*Paula A. Schwartz, EdD, IAP-L, ISM Senior Consultant  
Co-Convener, Advancement Academy*



\*Select Webinars earn you one credit toward ISM's International Advancement Certification Program ([isminc.com/iacp](http://isminc.com/iacp)) or Business Certification Program ([isminc.com/bcp](http://isminc.com/bcp)).



for Business Officers and Facility Managers

## The Well-Kept Campus: Strategies for the Facilities Manager

June 19–22 | 30 BCP CREDITS [isminc.com/bcp](http://isminc.com/bcp)

Led by: Patricia Myler • 13th year leading  
*Retired Facilities Director, Stone Ridge School of the Sacred Heart, MD*

Stewart Howard • 7th year leading  
*Director of Buildings and Grounds, Norfolk Academy, VA*

### TOPIC FOCUSED

*Facilities Managers and Business Officers overseeing facilities operations should attend this workshop.*

Learn how to efficiently maintain and manage school facilities. This course offers tools and strategies to evaluate, plan, and execute an effective facilities management program. You will leave with a game plan for both day-to-day and long-term operations of your school buildings, and a reference notebook full of proven ideas and practices to guide you.

### Takeaways

- Learn strategies for campus facilities management
- Gain skills to help you work as a team with your entire school constituency
- Perform facilities audits and develop a preventative maintenance program
- Work on preparing realistic short- and long-term budgets, tracking operations costs, and total cost of operation
- Learn regulations, codes, and legal issues affecting schools
- Discuss sustainability and “greening” your school
- Prepare for renovations and construction projects

### Tuition Information


Gold Member: \$2,314 // \$2,083 Early Bird or free with 10 Consortium Credits

Nonmember: \$2,722 // \$2,450 Early Bird

“The workshop was great, very informative. I definitely took away great best practice ideas to put into place at my facility.”

Josh Fernandez, Facilities Manager  
Fairmont Private Schools, CA

 we're trending

 Julie O'Flynn @JulieOFlynn

Looking forward to applying what I've learned at Strategies for the Facilities Managers workshop. Look out @stmsaints. Lol! #ISMINCsi15 July 21 2015

Tweet @isminc and use #ISMINCsi16!

## Financial Aid: Challenging Situations and Policies to Address Them

June 22–24 | 20 BCP/20 IACP CREDITS [isminc.com/bcp](http://isminc.com/bcp) | [isminc.com/iacp](http://isminc.com/iacp)

Led by: Brian Fulmer • 6th year leading  
*Director of FAST® and Financial Aid Consultant, ISM*

### TOPIC FOCUSED

*School Heads, Business Managers, Admission Directors, and Financial Aid Directors—anyone who works on the financial aid process at your school should attend this workshop.*

Business income. Divorced families. Confusing data. These are some of the issues that make determining financial aid a nightmare! You do your best to share your limited funds with families that truly need it, but challenging applications and situations leave you feeling uneasy and questioning your decisions. If you have felt this way, we have the course for you.

Together, we will explore the situations that drive you mad, and discuss how to craft questions that will guide your Board to create meaningful and useful policies. Putting these strong policies in place will protect your decisions from being questioned by either parents or superiors, and, finally, give you peace of mind.

### Takeaways

- Understand the need and power of policies
- Identify the clues families leave on their applications to their true financial need
- Explore problematic situations
- Craft good policies
- Understand how to present decisions to the Board that will ensure meaningful answers

### Tuition Information

Gold Member: \$1,548 // \$1,393 Early Bird or free with 10 Consortium Credits

Nonmember: \$1,821 // \$1,639 Early Bird

“I had the opportunity to sit down with the leader to review my school's financial aid grid, and to review an appeal from a parent. It was invaluable to be able to go over my school's real documents. The practical tools and sample award letters were very helpful.”

Kim Schmucki, Director of Admission & Tuition Assistance  
The School in Rose Valley, PA

Financial Aid



Tuition Management



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for Admission, Development, and Marketing Communications professionals

## The New Admission Director

June 19–22 | 30 IACP CREDITS or

July 17–20 | 30 IACP CREDITS [isminc.com/iacp](http://isminc.com/iacp)

Led by: Steve Salvo, IAP-S • 2nd year leading

Assistant Head for Advancement and Enrollment,  
Trinity Episcopal School, LA

### NEW TO POSITION

This workshop is a must for all new or less-experienced Admission Directors and Admission Assistants, or aspiring Admission Officers.

Your Admission Office is key to maintaining student enrollment and attracting the families your school wants. Less-experienced or new to the job, you may feel overwhelmed by the process and the issues involved. This workshop combines “nuts-and-bolts” topics with best practices, ISM research, and strategies to meet your goals.

### Takeaways

- Examine your inquiry-to-enrollment process, streamline forms and procedures, and revitalize open houses and campus appointments
- Separate immediate priorities from future projects
- Identify your web of allies, workers, and volunteers
- Effectively use interviews, recommendations, test results, and other screening procedures
- Review legal and ethical issues, affordability and financial aid, and barriers to full enrollment
- Complete a customized action plan to implement

### Tuition Information

Gold Member: \$2,314 // \$2,083 Early Bird or free with 10 Consortium Credits

Nonmember: \$2,722 // \$2,450 Early Bird

“We covered so many topics that I can’t pick the most valuable, but I especially got good ideas for more inquiries, open house, mission statement, student visits, and parent ambassadors. This was a fantastic experience and I look forward to coming to another ISM workshop!”

Kathryn Spinelli, Assistant Head of Admissions  
St. Francis Episcopal Day School, TX

## The New Development Director

June 19–25 | 50 IACP CREDITS [isminc.com/iacp](http://isminc.com/iacp)

Led by: Michael Larson, IAP-S • 1st year leading

Director of Advancement, The Fay School, TX

Paula Schwartz, EdD, IAP-L • 13th year leading

Senior Consultant, ISM

### NEW TO POSITION

For development professionals who are new to their positions, new to private-independent schools, or who have less than three years of experience in their roles.

The Development Office is responsible for the cultivation and care of the school’s donors while effectively managing the operations of the office. As a leader in your school’s development operations, your contributions to these two areas will have the most impact on creating and maintaining success and stability for your school. This workshop covers the fundamental concepts of the Development Office and will provide you with general knowledge of the wide range of responsibilities in a typical development office, as well as an understanding of priorities so that you can strategically drive your program.

### Takeaways

- Solid understanding of foundational independent school development theory and techniques
- An action plan for the first 100 days of your new school year
- Best practices for data management, analysis, and logistics
- New techniques for successful collaboration with admission, and marketing communications offices to increase the impact of your work

### Tuition Information

Gold Member: \$4,371 // \$3,934 Early Bird or free with 20 Consortium Credits

Nonmember: \$5,142 // \$4,628 Early Bird

“I have had four different Development Directors throughout my career as Head of School, and have sent all four to ISM development courses. There is no better training available.”

Donald M. Larson, Head of School  
Orangewood Christian School, FL

we're trending

Twitter Peterson, Brooke @razzberryink

Having a great week and loving that I get to connect to other admission folks! #ISMINSi15 Jun 23 2015,

Tell us if you're attending! Tweet @isminc and use #ISMINSi16

## The New Marketing Communications Director



June 22–25 | 30 IACP CREDITS [isminc.com/iacp](http://isminc.com/iacp)

Led by: Penny Rogers, IAP-L • 7th year leading  
Director of Admissions & Marketing,  
Academy at the Lakes, FL

### NEW TO POSITION

Marketing communications professionals who are new to or less-experienced in their roles or new to independent schools should attend this workshop.

Your Marketing Communications office is the “tie that binds.” It not only tells the story of your school, but also recruits new families, re-recruits existing families, and cultivates donors. If you are somewhat new to your position, you may not know where to start or where to focus your limited time. This workshop combines foundational, practical topics with efficient marketing communications procedures and proven materials to help you create strategies to meet your goals.

### Takeaways

- Increased understanding of how marketing communications serves your entire school
- A first-100-days plan to implement in your new school year
- Templates for a strategic marketing plan, schoolwide communication calendar, social media strategy, and crisis communication plan
- Best practices for print, digital, and social media

### Tuition Information

Gold Member: \$2,314 // \$2,083 Early Bird or free with 10 Consortium Credits

Nonmember: \$2,722 // \$2,450 Early Bird

“I thought everything was great overall. The social media piece and the analytics are areas where I needed to build my skills, but I feel as though I was able to come away with a good feeling and ready to get started to improve these areas.”

Joseph B. Knapp, Director of Admissions  
The Aquinas Institute, NY

## Mastering Enrollment Management

June 19–22 | 30 IACP CREDITS or

July 17–20 | 30 IACP CREDITS [isminc.com/iacp](http://isminc.com/iacp)

Led by: Amy Riley, IAP-S • 5th year leading  
Consultant and Academic Dean of IACP, ISM

### EXPERIENCED

Admission Directors with three or more years' experience and Heads of School who seek to shift from an admission processing mindset to one of enrollment management would benefit from this workshop.

The Admission Office is much more than an enrollment hub for prospective families. Enrollment managers are architects of mission-serving relationships that preserve the long-term viability of your school. This workshop is designed to help experienced admission professionals and School Heads see the connectivity between recruitment, re-recruitment, and the overall advancement of the school.

### Takeaways

- Learn how to use demographic and psychodemographic data to profile current families and target prospective ones
- Analyze your school's approach to enrollment budget-setting
- Gain an understanding of mission-advancing financial aid programs
- Create an enrollment management plan for your school
- Develop effective marketing strategies to leverage your schools mission aid community
- Break through silos and partner with development, marketing, and communications to advance the mission of the school
- Cultivate mission-serving relationships that promote long-term commitments to your school
- Help families come to terms with “best fit” in a market of independent school choices

### Tuition Information

Gold Member: \$2,314 // \$2,083 Early Bird or free with 10 Consortium Credits

Nonmember: \$2,722 // \$2,450 Early Bird

**Bring your team!** Pay only \$2,227 for each additional participant from your school. Call 302-656-4944 to register.

“Amy is an EXCELLENT instructor. I was impressed with the depth and breadth of her knowledge and her ability to share relevant, real-life examples with the class. I just want to download all the info in her brain and take it home with me!”

Pua Fernandez, Director of Admission  
Kamehameha Schools, HI





for Admission, Development, and Marketing Communications professionals

## Your Annual Fund From A to Z

June 19–22 | 30 IACP CREDITS [isminc.com/iacp](http://isminc.com/iacp)

Led by: L.J. Mitchell, IAP-L • 9th year leading  
*Director of Advancement, Little Red School House &  
 Elisabeth Irwin High School, NY, Adjunct Consultant, ISM*

### TOPIC FOCUSED

*Development Directors and development staff, as well as anyone new to annual fund management, should attend this workshop.*

Building a steady, dependable culture of philanthropy at any private-independent school requires a strong foundation: your annual fund. That program is the beating heart at the center of other giving initiatives, driving enthusiasm and funds that enable your independent school to go above and beyond in delivering its mission to students. Take this workshop if your school needs a rock-solid plan for implementing a donor-centric annual fund program—or to review basics with an eye to revitalizing your current program.

### Takeaways

- Learn how your Board strategically serves your annual fund
- Recruit volunteer leadership to serve on your Annual Fund Cabinet
- Find your school's story and reasons for support that inspire your constituents to give
- Identify, cultivate, solicit, recognize, and steward donors and prospects
- Develop your own action plan and prioritize next steps
- Market and communicate your school's story and annual fund campaign

### Tuition Information

Gold Member: \$2,314 // \$2,083 Early Bird or free with 10 Consortium Credits  
 Nonmember: \$2,722 // \$2,450 Early Bird

**Take this workshop and stay for Annual Fund Writing Clinic—  
 for only an additional \$990 tuition! Call 302-656-4944  
 to register.**

“ I wish to report that our annual fund has taken off this year. We have already surpassed our goal! I can't thank you enough for hosting such a great workshop last summer. I have implemented your suggestions and have seen nice changes. I am already excited about working on next year's plan.”

Laura Spitzig, *Director of Development*  
 Madison Community Montessori School, WI

## Annual Fund Writing Clinic

June 22–24 | 20 IACP CREDITS [isminc.com/iacp](http://isminc.com/iacp)

Led by: L.J. Mitchell • 9th year leading  
*Director of Advancement, Little Red School House &  
 Elisabeth Irwin High School, NY*

### TOPIC FOCUSED

*New Development Directors and development staff, others in a new annual fund role, or experienced professionals who need to give their materials a fresh approach, should make time for this workshop, especially in conjunction with the Your Annual Fund From A to Z workshop.*

The Development Office's portfolio of letters, envelopes, brochures, and folders must—technically and emotionally—tug the right strings with donors for your fund to set itself apart from its philanthropic competitors, exceed funding goals, and ultimately make your school the best it can be. Take this workshop if you want hands-on guidance to take your annual fund marketing materials from average to excellent.

In this two-day writing clinic led by one of ISM's leading experts on building and rebuilding private-independent school annual funds, you will work with your school's annual fund marketing materials to write or refresh your annual fund branding.

### Takeaways

- Turn your case for support into an inspirational story about your school, students, and mission
- Define your data-driven giving circles
- Design crisp, simple brochures
- Create your volunteer cabinet
- Utilize photographs for storytelling
- Craft inspiring letter appeals

### Tuition Information

Gold Member: \$1,548 // \$1,393 Early Bird or free with 10 Consortium Credits  
 Nonmember: \$1,821 // \$1,639 Early Bird

**Take Your Annual Fund From A to Z and stay for this  
 workshop—pay only \$990 additional tuition!  
 Call 302-656-4944 to register.**

“ I feel much more comfortable and confident about launching the annual fund. I have some great ideas and resources to assist with my action plan. I actually feel I will be able to raise more than I thought because of the tools and resources gained here.”

Fredrick Betts, *Head of School*  
 St. Benedict's Episcopal School, GA

## Millennials to Boomers: Marketing to a Multigenerational Audience



June 22–25 | 30 IACP CREDITS [isminc.com/iacp](http://isminc.com/iacp)

Led by: Simon M. Jaynes, IAP-L • 13th year leading  
Senior Consultant, ISM

Amy Riley, IAP-S • 5th year leading  
Consultant and Academic Dean of IACP, ISM

### TOPIC FOCUSED

Marketing Directors, Admission Directors, and Division Heads/Principals, and School Heads who seek to make the leap from “giving out” to “getting through” to a multigenerational parent population should attend this workshop.

As private-independent school marketing professionals welcome the first waves of millennial parents into their multigenerational target audience, they find themselves in a marketing quandary. How do they continue to communicate to the last waves of Baby Boomers while meeting the communications needs of the newest generation of private-independent school parents?

In this workshop, learn how to segment your approach and appeal to all three generations of parents. Enjoy the added benefit of applying your newfound understanding of Boomers, Gen Xers, and Millennials in the context of your own multigenerational workplace. Discover the difference between “information” (giving out) and “communication” (getting through) to establish and sustain the long-term enrollment and philanthropic commitments you need.

### Takeaways

- Use demographic and psychodemographic data to profile the communications needs of your current families and target prospective ones
- Examine your school’s approach to marketing budget-setting
- Leverage a multilayered communications approach with both digital and print appeal
- Include students in your marketing strategy

### Tuition Information

Gold Member: \$2,314 // \$2,083 Early Bird or free with 10 Consortium Credits  
Nonmember: \$2,722 // \$2,450 Early Bird

“The workshop leaders were very responsive to some of the other topics in which we were anxious to gain insight; our leaders and ISM itself were focused on making sure that researched and wise principles of leadership and my growth were focused on MY school’s mission, not just some high-minded generality.”

Tim Fenderson, Upper School Division Head  
Bear Creek School, WA

## Preparing for a Blockbuster Capital Campaign

July 6–9 | 30 IACP CREDITS [isminc.com/iacp](http://isminc.com/iacp)

Led by: Herbert P. Soles, CFRE, IAP-L • 10th year leading  
Adjunct Consultant, ISM | Assistant Headmaster for  
Development, Norfolk Academy, VA

Paula Schwartz, EdD, IAP-L • 13th year leading  
Senior Consultant, ISM

### TOPIC FOCUSED

Development Directors, aspiring Directors, School Heads, Trustees, and Development Committee members should attend this workshop.

“If you fail to plan, you plan to fail”—and that adage is never more true than when you’re preparing for a capital campaign. Before you can chart the next steps of your campaign’s course, you have to know where you currently stand, as well as your school’s assets and obstacles. This workshop covers surefire strategies to fully prepare for a successful campaign, motivate and engage your supporters, and create an inspirational and sustainable vision for future endeavors.

### Takeaways

- Place a capital campaign into your current development programing
- Review the pros and cons of a capital campaign and its impact on the school community, annual giving, donors, and prospects
- Focus your school’s philanthropic approach to gain better long-term community support
- Define leadership roles, create job descriptions, and set up a volunteer organization
- Understand the roles of strategic planning, assessing your development program, conducting a feasibility study, and allocating resources

### Tuition Information

Gold Member: \$2,314 // \$2,083 Early Bird or free with 10 Consortium Credits  
Nonmember: \$2,722 // \$2,450 Early Bird

**Bring your team!** Pay only \$1,671 tuition for each additional team member attending with you. Call 302-656-4944 to register.

“We learned so much! It was wonderful how they expanded on the agenda and gave us more time!”

Yukiko Meadows, CFRE, IAP, Director of Development  
Marin Primary & Middle School, CA

 we're **trending**

 Yukiko Meadows (@ymeadowsf)

This has been an experience I will never forget!  
Capital Campaign—here I come! #ISMINCsi15  
Jul 11 2015

Tell us if you're attending! Tweet @isminc and use #ISMINCsi16



for Division Heads, Deans, and Faculty Leaders

## Chairing Your Department: The First Five Years

June 26–29

Led by: Diane Hunt • 11th year leading

*Head of Lower School, Charles Wright Academy, WA*

or July 17–20

Led by: Mike Gwaltney • 2nd year leading

*Chair of the PK–12 History Department, Oregon Episcopal School, OR*

### NEW TO POSITION

*This workshop is ideal for Department Chairs with up to three years' experience, and for those up to five years looking for new insights and peer networking.*

No longer a peer, as Department Chair, you are the administrative liaison for colleagues and the School Head's academic program in your discipline. How do you best fulfill the demands of this “middle-management” position?

Whether you're new to the position or have up to five years of experience and are looking for new ways to approach the job, you'll find the orientation you need in this workshop. Working collaboratively with the other participants, you will address the rewards and challenges in the transition from peer to manager.

### Takeaways

- Examine leadership challenges, the critical interpersonal competencies for leaders, and changes that occur as teachers become school leaders
- Gain techniques for managing your time and paper flow
- Return to your school with effective strategies for departmental management, curricular design, and communication—and a peer network to leverage for advice and insight for the rest of your career

### Tuition Information

Gold Member: \$2,314 // \$2,083 Early Bird or free with 10 Consortium Credits

Nonmember: \$2,722 // \$2,450 Early Bird

**“** I really enjoyed learning from the experience of our workshop leader, as well as the other participants. The information I gained was invaluable and directly applicable to my role in my school. **”**

Jill Robert, *Math, Science & Technology Department Chair*  
Miami Country Day School, FL

## The Assistant Headship

July 6–9

Led by: Bryan Smyth, PhD • 3rd year leading  
*Consultant, ISM*

Bill Shelnutt • 1st year leading

*Head of School, St. Luke School, GA*



### TOPIC FOCUSED

*This workshop is geared for both new Assistant Heads and Assistant Heads looking to step-up their school leadership skills.*

As Assistant Head, you juggle a multitude of tasks, interact with a variety of constituencies, and act as the leaders when the Head is unavailable. However, while other school leadership positions have job descriptions that are nearly identical across the all independent schools, the Assistant Head's job description is highly varied and can even change significantly year-to-year.

As a result, this role requires flexibility, confidence, people skills, and a wide working knowledge of school operations. In this workshop you will gain a fresh perspective on performing your critical support functions while drilling down on a key issues to help you develop into more complete school leader and ultimately assist the School Head in leading the school in effective ways.

### Takeaways

- A deeper understanding of your role as Assistant Head
- Key management strategies that are critical to enhancing your school's stability and ability to carry out its mission
- Ways to maximize your relationship with the School Head
- Candid conversations with a current Head of School—learn what is it that Heads of School *really* want from you
- Plans to implement for the next year

### Tuition Information

Gold Member: \$2,314 // \$2,083 Early Bird or free with 10 Consortium Credits

Nonmember: \$2,722 // \$2,450 Early Bird

**“** ISM's workshops are the 'gold standard' for professional development for independent school educators. Whether you are new to your role or an experienced leader, you will learn new information and come back to your school renewed and ready to contribute in innovative ways. **”**

Jennifer Hinote, *Head of School*  
Oak Hill School, TN



# Directing the Athletic and PE Programs

July 10–16

Led by: Steve Colflesh, CMAA • 20th year leading  
Retired Athletic Director, Seabury Hall, HI

Mary Jo Pruitt • 1st year leading  
Director of Athletics, Castilleja School, CA

## NEW TO POSITION

*Athletic Directors with less than three years of experience should sprint—not walk—to this workshop.*

Your athletic program represents one of the largest departmental budgets in your school—and this workshop ensures that your school gets the most for its money. We'll cover everything from creating outstanding programs and making the most of your facilities, to building school spirit, and addressing hot topics in the field.

## Takeaways

- Understand the independent school's athletic program and your role as Athletic Director
- Weave together academics and interscholastics
- Develop effective physical education programs
- Manage the difficult coach-parent-child dynamic
- Find the right coaches for your program

- Assemble a Coach's Handbook for better communication while creating a parent/student handbook
- Learn how to work with the media by using student awards to advertise your school, and host special events to bring in students

## Tuition Information

**Gold Member:** \$4,371 // **\$3,934 Early Bird** or free with 20 Consortium Credits

**Nonmember:** \$5,142 // **\$4,628 Early Bird**

**Bring your team!** Pay only \$3,133 tuition for each additional team member from your school attending with you. Call to register, 302-656-4944.

**“** It was great to have leaders with a ton of experience. They clearly have a mastery of the content, and as coaches with an engaging style of delivering content. Hearing best practices and then learning tricks of the trade from actual experiences has helped focus my plan for the next year.”

Jason Tognetti, Athletic Director  
San Francisco Day School, CA

# Focus on true 1:1 integration of technology for student-centered learning



**LAUSANNE**  
LEARNING INSTITUTE

*In partnership with ISM*

July 10-12 in Memphis, TN

Activate your classroom!

Register at [lausannelearning.com](http://lausannelearning.com)



for Division Heads, Deans, and Faculty Leaders

## Balance Your Roles as Upper School Dean of Students

July 10–16

Led by: Susan E. Hazell, IAP- S • **21st year leading**  
*Director of Development, Ridley College,  
 St. Catharines, ON*

Jessica Clark • **2nd year leading**  
*Dean of Student Life, National Cathedral School for  
 Girls, Washington, DC*

### NEW TO POSITION

*This workshop is specifically for Upper School Deans of Students who are new to their position.*

The Upper School Dean of Student's "balancing act" as advocate and disciplinarian requires diplomacy, empathy, and discipline—all three of which can be difficult to maintain in the extreme stress of everyday school life. You also need to develop programs that support adolescent growth in the context of your school's mission. In this workshop, you will learn to think about your job as visionary, in addition to day-to-day strategies through case studies, role play, small group work, research and presentations, and large group discussion.

### Takeaways

- Knowledge about discipline systems, the philosophy behind discipline, legal issues, and ethical concerns
- Strategies for developing a school culture that supports student learning by making decisions that support adolescent growth and your school's mission
- Evaluation of your leadership style and your potential for developing faculty and student leaders in your school community
- Strategies for working with colleagues and with parents
- Ideas for effective retreats, orientations, honor systems, and assemblies
- A crisis management plan that includes deep analysis of issues like death, suicide, rape, serious accident, etc.
- A network of Deans to rely on for policies, ideas, information, and support in the years ahead

### Tuition Information

Gold Member: \$4,371 // **\$3,934 Early Bird** or free with 20 Consortium Credits  
 Nonmember: \$5,142 // **\$4,628 Early Bird**

“The small group setting with multiple opportunities to break into smaller groups and get 'real world' advice and ideas from colleagues was an incredible experience.”

Thomas LaFarelle, *Dean of Students*  
 Trinity School of Midland, TX

## Leading the Effective Upper School

July 10–16

Led by: Barbara Beachley • **5th year leading**  
*Consultant and Director of Survey Research, ISM*

Andy King • **1st year leading**  
*Upper School Director, Hackley School, NY*

### NEW TO POSITION

*New Upper School Heads will benefit from this collegial experience.*

You run the most expensive and complex segment of a K–12 school and it never gets easier. Students want more activities and class options. Parents need to know their investment in your school is paying off. And both demand excellent preparation for the next step—usually college.

How do you build a community everyone wants to join? Meet parent and student expectations? Budget realistically in a changing economy? Count on this workshop to answer your questions and advance your abilities as a leader in a challenging job.

### Takeaways

- Understand your personal leadership style, as well as how to create an effective team, and set goals and reach them
- Learn an evaluation method that both mentors and nurtures your faculty
- Create faculty experts who train each other; design meaningful in-service programs and faculty meetings
- Gain techniques for effective communication and for working with difficult students
- Examine risk-management issues, litigation, and hot topics like sexual harassment and discrimination

### Tuition Information

Gold Member: \$4,371 // **\$3,934 Early Bird** or free with 20 Consortium Credits  
 Nonmember: \$5,142 // **\$4,628 Early Bird**

“The leaders did a phenomenal job. They were complementary in their gifting, passions, and experience. Their humility set a tone for the workshop that enabled a more powerful experience for the participants.”

Russ Kapusinski,  
*Assistant Head of School/Upper School Principal*  
 The Cambridge School, CA

## Leading the Effective Middle School

July 10–16

Led by: Kathy Christoph • 22nd year leading

*Middle School Principal, Dwight-Englewood School, NJ*

Matthew Stuart • 11th year leading

*Head of School, The Caedmon School, NY*

### NEW TO POSITION

*Ideal for new and aspiring Middle School Heads, as well as aspiring Middle School administrators. Experienced School Heads looking for a refresher would also benefit from this workshop.*

Ideal leaders establish middle schools that engage and excite young adolescents, keep faculty reflective and at their best, and establish parents' trust in the school's expertise. A school must provide support and challenges, character development and discipline, and cutting-edge experiences that reflect first-rate academics. This workshop equips participants with skills and ideas to nurture these must-have attributes in their middle schools, embracing their role as leaders, and provide the information needed to balance being a Division Head and member of the Management Team.

### Takeaways

- An action plan for the coming year, which incorporates your strengths as a Middle School Director
- Ideas about compelling leadership and self-knowledge about your personal style
- A middle school mission statement that is right for your school and aligns with your personal leadership mission
- Knowledge about how the characteristics of middle school-aged children impact curriculum, character development, and discipline
- An introduction to modern theory on middle school curriculum development; important components of the middle school model, diversity, technology; and opportunities for innovative learning
- How to facilitate effective teacher coaching, growth, and development

### Tuition Information

**Gold Member:** \$4,371 // **\$3,934 Early Bird** or free with 20 Consortium Credits

**Nonmember:** \$5,142 // **\$4,628 Early Bird**

“Excellent! It was a tremendously valuable, wonderfully exhausting, joyful experience.”

Kimberly Clarkson, *Middle School Director*  
Moorestown Friends School, NJ

## Leading the Effective Lower School

July 10–16

Led by: Jenny Knight • 7th year leading

*Lower School Director, Miami Country Day School, FL*

Simon M. Jeynes, IAP-L • 13th year leading

*Senior Consultant, ISM*

### NEW TO POSITION

*Ideal for new and aspiring Lower School Heads, as well as aspiring Lower School administrators. Experienced School Heads looking for a refresher would also benefit from this workshop.*

Running an outstanding elementary school takes a special touch. Young students need a vibrant environment; a balance of structure and opportunities for independence; teachers who understand them, both developmentally and as individuals; and a rich, activity-filled program. This workshop covers all the bases—from meeting parent expectations and hiring the right teachers to inspiring young minds—while also considering your roles as both a Division Head and a member of the Management Team.

### Takeaways

- Examine your school's mission and vision, and your own strengths as a leader and facilitator
- Learn sound principles for an elementary Head/Principal
- Discuss your school community's expectations, needs, and communication strategies
- Put proven strategies for parent involvement to work
- Manage conflict, diffuse volatile situations, and expand your interpersonal communication skills

### Tuition Information

**Gold Member:** \$4,371 // **\$3,934 Early Bird** or free with 20 Consortium Credits

**Nonmember:** \$5,142 // **\$4,628 Early Bird**

“I am exceedingly grateful for this experience. I have been inspired and equipped by the concepts and ideas I have received. Meeting other colleagues at the same, or similar, point in their journeys was comforting. I could freely ask questions or express my thoughts. I hope to attend another ISM workshop in the future.”

Deb Knoblock, *Head of Lower School*  
Mount Pisgah Christian School, GA

we're **trending**

Tim Rice @timoarroz

ISM Summer Institute 2015 Matthew and Kathy are fantastic. #ismincsi2015 Jul 15 2015

Tell us if you're attending this year!  
Tweet @isminc and use #ismincSI16





for Division Heads, Deans, and Faculty Leaders

## The New Grade-Level Dean: Creating a Positive, Supportive, and Healthy Environment for Students

July 17–20

Led by: Jim MacLaughlin • 2nd year leading  
10th Grade Dean, Pingree School, MA

### NEW TO POSITION

*This workshop is intended for new Upper School Grade Deans/  
Housemasters.*

As the Grade Dean or Housemaster model becomes more popular in private schools, this workshop teaches new or recently appointed Grade Deans how to succeed as both disciplinarians and student-centered supporters. Taught by a veteran Grade Dean, teacher, and coach, participants will engage in group discussions, share current practices and methods, examine current research, and explore case studies and role-playing exercises aimed at enhancing the safety and health of their school communities.

### Takeaways

- Study new approaches to student discipline and support, and learn how to act as both disciplinarian and advocate for your students
- Develop expertise in working with specific grade- and age-level developmental issues
- Develop and foster a supportive Grade Team of faculty members
- Discover your role in proper procedure and legal responsibilities
- Examine case studies on discipline; hazing; and technological, developmental, and grade-level problems
- Create an action plan for your grade with four goals for the coming school year

### Tuition Information

Gold Member: \$2,314 // \$2,083 Early Bird or free with 10 Consortium Credits

Nonmember: \$2,722 // \$2,450 Early Bird

*Bring your team! Pay only \$1,671 for each additional team member attending with you. Call 302-656-4944 to register.*

“ I think what I gained the most was the confidence to know that my school is doing things right, and that my ideas are sound ones for making positive changes where we need them.”

Kalyn Underwood, Upper School Dean of Students  
St. Georges Independent School, TN

## The New Middle School Dean of Students

July 17–20

Led by: Joseph Moody • 1st year leading  
Middle School Dean of Student Life for Boys,  
The Lovett School, GA

Maria Croley Madden • 1st year leading  
Middle School Dean of Student Life for Girls,  
The Lovett School, GA

### NEW TO POSITION

*This workshop is designed specifically for Middle School Deans of Students, and those looking for a refresher.*

After leaving the nurturing environment of the lower school, students find themselves thrust into the new world of middle school. Middle school students must deal with increased discipline, larger student communities, and fewer personal relationships with teachers while simultaneously coping with the physical and emotional changes they experience as they begin puberty and adolescence. In this course, we give Middle School Deans research-backed strategies to make middle school a smooth transition from the lower school to upper school for all involved.

### Takeaways

- Set measurable goals for the upcoming academic year and plan ways to make them a part of school culture
- Examine the philosophical roles and the responsibilities of the middle school dean
- Proactively construct a positive student culture and mitigate disciplinary infractions before they occur
- Learn how to increase your visibility in the role of advocate, and even the balance between advocate and disciplinarian
- Develop the tools to create a common language with students, faculty, parents, and administration
- Review the important factors in making an impact on middle schoolers based on their development

### Tuition Information

Gold Member: \$2,314 // \$2,083 Early Bird or free with 10 Consortium Credits

Nonmember: \$2,722 // \$2,450 Early Bird

“ This workshop will be a turning point in my career, and in my thinking about my role in the school I serve.”

Nick Malick, Dean of Students  
Prospect Sierra School, CA

## Experienced Division Leaders Symposium

June 26–29

Led by: Simon M. Jaynes, IAP-L • 13th year leading  
Senior Consultant, ISM

Ashanti Bryant • 1st year leading  
Principal, Grand Rapids Christian School, MI



### EXPERIENCED

*This workshop is designed for experienced Division Heads.*

Coming to this symposium provides an opportunity for division leaders from elementary, middle, and upper school divisions with at least three years of experience to come together and discuss matters of great significance in their careers and schools.

This symposium is an opportunity to learn in the company of experienced and sophisticated colleagues. The days are evenly split between the retreat leaders providing guided conversation, and the participant network driving conversations that are most pertinent to their own situations.

### Takeaways

- Knowledge about the cutting edge in academic innovation and creativity
- Examination of potential metrics, and application to your own school
- Examination of ISM's continuing research
- Methods that will allow you to use your time effectively and get results that continue your mission into the future
- More confidence about how to compete and sustain, even grow, your student body

### Tuition Information

**Gold Member:** \$2,314 // **\$2,083 Early Bird** or free with 10 Consortium Credits

**Nonmember:** \$2,722 // **\$2,450 Early Bird**

**Bring your team!** Pay only \$1,671 for each additional participant from your school. Call 302-656-4944 to register.

“**Superb!** It is evident that you have been responsive to previous workshop participants as this has been one of the most relevant professional development experiences I've had.”

Debbie Ayers, Upper School Assistant Director  
Flint Hill School, VA

we're **trending**

**John Higgins (@djhiggs3)**

Excellent discussions about grade-specific scenarios and brainstorming solutions! #ismincsi15

Jul 17 2015

Tell us if you're attending! Tweet @isminc and use #ISMINCsi16

## Transformative Academic Leadership: Fostering a Growth-Focused and Student-Centered Culture

June 26–30

Led by: Barbara Beachley • 5th year leading  
Consultant and Director of Survey Research, ISM

### EXPERIENCED

*Designed for academic administrators such as Division Heads and Academic Deans, School Heads and other administrators who are involved with faculty on a regular basis.*

Research shows that a growth-focused culture is the primary predictor of student performance, satisfaction, and enthusiasm. However, growth and necessary changes can either excite and energize a school community, or terrify and cause resistance.

School leaders must reconcile multiple, competing priorities while still affecting these higher-order changes that schools require to remain sustainable and effective. This workshop empowers you to face the personal and professional challenges that come with enacting change through concrete strategies to lead your school from excellent to extraordinary—while simultaneously caring for yourself.

### Takeaways

- Transform the learning culture of your school
- Discover tools to assess and improve your school culture through data collection, teacher evaluation, and leadership best practices
- Consider who you are as a leader, *why* you're a leader, and identify those areas in which you excel, and in which you can improve
- Increase your ability to communicate powerfully and effectively with all constituents
- Get up-to-date on modern teaching and learning strategies
- Network and share strategies with other academic leaders
- Maintain balance and harmony in your career
- Develop an action plan of the key steps you can take to transform your school

### Tuition Information

**Member:** \$3,092 // **\$2,783 Early Bird** or free with 15 Consortium Credits

**Nonmember:** \$3,638 // **\$3,274 Early Bird**

**Bring your team!** Pay only \$2,227 for each additional participant from your school. Call 302-656-4944 to register.

“**There was a 'personal' nature to this ISM experience. It is incredibly important to mention that, no matter who I approached, I felt the same warmth and care and concern for my needs. This felt exceptional to me—above and beyond—and it felt systemic; not of just one or two people. That should be a source of pride as a company and I was truly grateful for it.**”

Pamela Penna, Director of Curriculum & Instruction  
The Park School, MA

## Train Your Faculty in Blended and Personalized Learning

June 26–28

Led by: Mark Engstrom • 2nd year leading

*Certified Blended Learning Designer, Head of Middle and Upper School, Allen Academy, TX*

### TOPIC FOCUSED

*This workshop is ideal for faculty teams piloting blended/ personalized learning initiatives, and faculty leaders looking to implement technology for deeper student engagement in learning.*

Dive into the philosophies, research, resources, and templates that will help you develop a blended/ personalized learning initiative at your school. Master the flow from face-to-face experiences to online work and back again, enhancing both your students' experience and your teachers' efficacy wielding these strategies in your classroom. After this workshop, blended/ personalized learning will no longer be a distant dream or buzz phrase—you'll be ready to implement a program that will change the way your students learn!

### Takeaways

- Successfully implement a blended/ personalized learning program at your school
- Demonstrate blended-learning templates and techniques for your faculty
- Evaluate online tools in context of your school's needs
- Build a support network of fellow blended/ personalized learning educators
- Communicate effectively and with authority to all stakeholders to support your successful blended/ personalized learning environment

### Tuition Information

Gold Member: \$1,548 // \$1,393 Early Bird or free with 10 Consortium Credits

Nonmember: \$1,821 // \$1,639 Early Bird

**Bring your team!** *This workshop is ideal for teams of faculty/ faculty leaders learning together. Pay only \$1,114 for each additional team member. Call 302-656-4944 to register.*

**“**Mark is a phenomenal presenter. I truly appreciated his interest in each individual's takeaway from the presentation, and his flexibility with altering his presentation to meet the needs of both administrators and teachers in the room.**”**

Paul Clementi, *Social Studies Teacher,*  
Merion Mercy Academy, PA

## The Double-edged Sword of Diversity: Reframing Community Life Initiatives in Independent Schools

June 26–28

Led by: Derrick Gay • 2nd year leading

*Educational Consultant*

### TOPIC FOCUSED

*Anyone interested in fostering a more inclusive independent school community is welcome in this workshop.*

The word “diversity” is often ill-defined, represents a divisive identity, and can create a well-meaning—but unhelpful—“savior” mindset. This workshop facilitates participant-driven reflection and discussion on individual and institutional assumptions, beliefs, attitudes, and behaviors. Finishing this workshop will set your school on the path toward a more inclusive school community.

### Takeaways

- Get concrete resources to inform articulating your vision around diversity and inclusion
- Learn proven, effective, best community-building practices in other independent schools
- Begin to assess your school's needs and potential resources to realize your community goals
- Learn more about your own identity and how you perceive other's insights that will foster an inclusive environment
- Join networks of other independent school educators to reflect on these issues of community life

### Tuition Information

Gold Member: \$1,548 // \$1,393 Early Bird or free with 10 Consortium Credits

Nonmember: \$1,821 // \$1,639 Early Bird

**Bring your team!** *This workshop is ideal for teams of faculty/ faculty leaders learning together. Pay only \$1,114 for each additional team member. Call 302-656-4944 to register.*

**“**The value in choosing appropriate language when addressing others was a key point in the conference. The power of our statements and/or questions can be very impactful for our listening audience. Often, we make statements, create assumptions, and ask questions without regard to how this may affect the listener.**”**

Anthony Thomas, *Dean of Students*  
Woodward Academy, GA

## Hands-on Advisory: Curriculum, Themes, and Activities

June 26–29

Led by: Merritt Livermore • 9th year leading  
*Head of Upper School, McDonogh School, MD*

Scott Winham • 6th year leading  
*Upper School Head, Seabury Hall, HI*

### TOPIC FOCUSED

*Middle and Upper School teachers new to advisory, or those who want to revamp their advisory programs will benefit.*

A thriving advisory program is a difference-maker for middle and upper school students. How does yours rate? In this highly interactive workshop, teachers learn core concepts for focusing and building (or rebuilding) the program. Exchange a wealth of ideas in small groups with colleagues from the same division, and leave with substantive recommendations for others back home—supported by a comprehensive outline of advisory practices, themes, and activities—as well as a plan to “make it happen.”

### Takeaways

- Create a framework for your school’s program and Advisory Program committees
- Learn techniques for engaging students and working with parents
- Educate colleagues about “yellow light” and “red light” issues
- Emphasize the difference between academic and personal guidance
- Develop advisory themes and activities to support both academic success and personal development
- Build the basics of a curriculum and foster advisors’ buy-in

### Tuition Information

Gold Member: \$2,314 // \$2,083 Early Bird or free with 10 Consortium Credits

Nonmember: \$2,722 // \$2,450 Early Bird

“What I learned will impact my school in so many ways! I gained the tools and support to reach my goal of making advisory as meaningful as possible to students.”

Tina Clayton, *Middle School English Teacher*  
Trinity Valley School, TX

## Bring a Strengths-Based Approach to Your School’s Advisory Program

June 30 | 8am–4pm

Led by: Roger Dillow • 9th year leading  
*Adjunct Consultant, ISM*

### TOPIC FOCUSED

*Best suited for School Heads and Assistant Heads of Middle and Upper School divisions, Deans of Students, and Grade-Level Advisory team leaders. Individual advisor practitioners and others who support quality of student life (Chaplains, Counselors, Diversity Coordinators, Admission Directors) will benefit, as well.*

Go beyond “clinical advising” and instructional group advisory to focus on helping advisees identify, cultivate, use, and find joy in their distinguishing, individual “signature strengths.”

Drawing on research by ISM and from the broad and growing field of positive psychology, this intensive, one-day workshop covers the foundational principles and key practices in implementing a positive, strengths-based approach in this important student guidance and support program.

### Takeaways

- A solid understanding of the distinctive benefits of the advisor as a “positive coach”
- A plan for starting the year in a strengths-based direction with colleagues, advisees, and their parents
- Positive coaching skills and tools to use with individual advisees and advisory groups
- Access to pertinent resources and a network of positive coaching peers
- Professional renewal through a better understanding of your own strengths as an educator

### Tuition Information

Gold Member: \$1,032 // \$929 Early Bird

Nonmember: \$1,214 // \$1,093 Early Bird

*Stay for this workshop after any workshops between June 26–29th—for only an additional \$790 tuition! Call 302-656-4944 to register.*

“I have a better insight into what works and what doesn’t for the advisory program. We learned that we were not the only school with issues with advisory. The information shared, the activities, and in-depth discussions were all valuable.”

Nigel Richmond, *Mathematics*  
Grace Church School, NY





for Division Heads, Deans, and Faculty Leaders

## Student-Centered Scheduling

July 10–16

Led by: Bryan Smyth, PhD • 3rd year leading  
Consultant, ISM

### TOPIC FOCUSED

Middle and Upper School Schedulers and leadership should attend this workshop.

A school's schedule is not just tactical; it is a statement of the school's mission and philosophy reflected in how you use time, people, and space to facilitate your pedagogy and deliver your program.

Take this workshop if you want to know how your schedule can help facilitate the best learning experience for students. You will learn to:

- Reduce the frenetic pace of day
- Give your students exactly the classes they want
- Fit in the program you want to deliver
- Change your schedule design to better reflect how you want to teach
- Carve out meaningful teacher collaboration time
- Experience scheduling without conflict!

### Takeaways

- The best strategy for scheduling your school without conflict
- The latest research and theories for scheduling the modern school
- Clear direction to improve the design of your school's schedule

### Tuition Information

Gold Member: \$4,371 // \$3,934 Early Bird or free with 20 Consortium Credits

Nonmember: \$5,142 // \$4,628 Early Bird

**Bring your team!** Pay only \$3,133 tuition for each additional participant from your school. Call to register, 302-656-4944.

“ISM has put together a comprehensive workshop that makes it impossible to leave without excitement to go back to school and start discussion and change. The networking I have done has been invaluable.”

Jamie Haines, History Department Team Leader  
The Rectory School, CT

## Scheduling the Elementary School Program

July 13–16

Led by: Roxanne S. Higgins • 34th year at ISM  
President and Senior Consultant, ISM

Only offered in alternate years!

### TOPIC FOCUSED

Lower School Heads and Schedulers should attend this workshop.

For more than 25 years, our *Student-Centered Scheduling* workshop has guided middle and upper school administrators. Now *Scheduling the Elementary School Program* adapts ISM's unique processes and principles to the specific scheduling challenges of the lower school.

### Takeaways

- Gain hands-on experience in maximizing the use of space to minimize scheduling conflicts
- Determine the appropriate mix of core and specialty time
- Learn the steps to a conflict-free, slower-paced schedule
- Design and process your own schedule, and create a master design for your elementary school or division
- Get assistance and critique from the workshop leader
- Return to your school with strategies to get everyone's "buy-in" for your optimized schedule

### Tuition Information

Gold Member: \$2,314 // \$2,083 Early Bird or free with 10 Consortium Credits

Nonmember: \$2,722 // \$2,450 Early Bird

“I definitely gained a much greater understanding of all that is involved in creating a master schedule for a school. I enjoyed discussing the philosophy and thinking that goes into different types of schedules ... and the benefits/disadvantages of each.”

Martha Newson, Dean of Studies  
Oak Hill School, TN



YOU MIGHT ALSO BE INTERESTED IN:

***Scheduling Without Conflict***  
at [isminc.com/bookstore](http://isminc.com/bookstore)

Now more than ever, your school must maximize its use of available time, space, faculty, and dollars. That's what a great schedule does! *Scheduling Without Conflict for Private-Independent Schools*, a collection of key articles from ISM advisory letters, defines the critical components of a strong schedule.

For more information visit page 48 of this catalog.



## Teaching Excellence II: Developing Your Faculty Culture

July 10–12

Led by: Walker Buckalew, PhD • 29th year leading  
Executive Consultant, ISM

### TOPIC FOCUSED

School Heads, Division Heads, Department Chairs, others who hold leadership positions with the faculty, and teachers.

Based on ISM's Student Experience Study and the seminal Model Schools Project, this workshop outlines how to use key assessment instruments for lifelong faculty professional growth and development, all designed to enhance the student experience. You return with a copy of the *Teaching Excellence II* workbook, as well as practice in using the four instruments that it provides.

### Takeaways

- The *Teaching Excellence II* workbook, which includes the Faculty Experience Survey, the Faculty Culture Profile II, the Student Experience Profile II, and the Mission Application Plan (MAP)
- Hands-on experience in using and integrating all four instruments
- A clear understanding of a professional-growth-based faculty evaluation system's effect on students
- Strategies on creating a small teacher unit to assist in the application of the system and in the interpretation of the data that it generates

### Tuition Information

Gold Member: \$1,548 // \$1,393 Early Bird or free with 10 Consortium Credits

Nonmember: \$1,821 // \$1,639 Early Bird

**Bring your team!** Pay only \$1,114 for each additional participant from your school. Call 302-656-4944 to register.

“I learned that within this clear-cut, accessible model, there is still no 'one size fits all,'—which I found refreshing. The instructor balanced the program's model well, while showing how it can work in many different contexts.”

Michele Brown, Academic Dean  
The Weber School, GA



YOU MIGHT ALSO BE INTERESTED IN:

**Comprehensive Faculty Development and Teaching Excellence II Package**  
at [isminc.com/bookstore](http://isminc.com/bookstore)

For more information visit page 50 of this catalog.

## Evaluation, Compensation, and All Things HR for Independent Schools

July 17–20 | 30 BCP CREDITS [isminc.com/bcp](http://isminc.com/bcp)

Led by: Terry L. Moore, BCP-E • 14th year leading  
Executive Consultant, ISM

### TOPIC FOCUSED

Both new and experienced School Heads, Division Heads, Department Chairs, Academic Deans, or anyone responsible for faculty evaluation should attend. This workshop is especially useful for teams!

Highly engaged teachers benefit your school in every way, we all know that. But actually creating a culture of expectation—clearly defined and vigorously perused—can be overwhelming. In this dynamic workshop, you will learn ISM's three-step Purposes and Outcomes process for setting clear expectations for your entire community. Once we understand and articulate expectations, then creating an evaluation and compensation system to support faculty easily follows.

We'll also review the legal aspects of HR, giving you a working understanding of the critical aspects of managing faculty. Finally, we'll cover the hiring induction process, making sure you understand the complete HR life cycle. You'll leave the workshop with tools to create your own evaluation system, and enough information to decide how to change your compensation structure—and whether it must change at all.

### Takeaways

- Increased understanding of the HR life cycle
- Tie your mission statement to faculty evaluation
- Sample evaluation tools
- Hiring and induction processes
- Working knowledge for implementing a merit-based pay system
- A step-by-step guide to change your evaluation and compensation structures

### Tuition Information

Gold Member: \$2,314 // \$2,083 Early Bird or free with 10 Consortium Credits

Nonmember: \$2,722 // \$2,450 Early Bird

**Bring your team!** Pay only \$1,671 for each additional team member attending with you. Call 302-656-4944 to register.

“Most valuable to me is the Characteristics of Professional Excellence and its ability to provide a meaningful evaluation and management relationship between faculty and administration. This will significantly enhance the organizational structures and systems, making them more useful for everyone involved. The strong leaders and group make this an outstanding experience.”

Tim Belk, Academy Dean/Assistant Headmaster  
Boston Trinity Academy, MA



# School-Year Workshops

**FALL & WINTER 2016–2017 • VARIOUS LOCATIONS**

Boost your job performance and improve your school by taking one of ISM's position-specific school-year workshops, created especially for private-independent school administrators.

**Reserve your spot today!**

Register at [isminc.com/syw](http://isminc.com/syw) or call us at **302-656-4944**.

## The New Admission Director

WILMINGTON, DE

**October 5–8** | 30 IACP CREDITS [isminc.com/iacp](http://isminc.com/iacp)

Led by: Amy P. Riley, IAP-S • 5th year leading  
Consultant and Academic Dean of IACP, ISM

### NEW TO POSITION

*This workshop is a must for all new or less-experienced Admission Directors and Admission Assistants, or aspiring Admission Officers.*

Your Admission Office is key to maintaining student enrollment and attracting the families your school wants. Less experienced or new to the job, you may feel overwhelmed by the process and the issues involved. This workshop combines “nuts-and-bolts” topics with best practices, ISM research, and strategies to meet your goals.

### Takeaways

- Examine your inquiry-to-enrollment process, streamline forms and procedures, and revitalize open houses and campus appointments
- Separate immediate priorities from future projects
- Identify your web of allies, workers, and volunteers
- Effectively use interviews, recommendations, test results, and other screening procedures
- Review legal and ethical issues, affordability and financial aid, and barriers to full enrollment
- Complete a customized action plan to implement

### Tuition Information

Gold Member: \$2,314 or free with 10 Consortium Credits

Nonmember: \$2,722

“Amy is incredibly knowledgeable, which showed in all her presentations and insights. It is nice to have theoretical readings as well as sample forms and timelines. Amy was wonderful at facilitating sharing of information between people and encouraging people to talk as new ideas are being developed all the time. She was quick to point out the pros and cons of different ideas to give us all new ways to think about what we are doing.”

Lisa Gamble, Admissions Director/Associate Head of School  
State College Friends School, PA

## Mastering Enrollment Management

WILMINGTON, DE

**November 9–12** | 30 IACP CREDITS [isminc.com/iacp](http://isminc.com/iacp)

Led by: Amy P. Riley, IAP-S • 5th year leading  
Consultant and Academic Dean of IACP, ISM

### EXPERIENCED

*Admission Directors with three or more years' experience and School Heads who seek to shift from an admission processing mindset to one of enrollment management would benefit from this workshop.*

The Admission Office is much more than an enrollment hub for prospective families. Enrollment Managers are architects of mission-serving relationships that preserve the long-term viability of your school. This workshop is designed to help experienced admission professionals and Heads of School see the connectivity between recruitment, re-recruitment, and the overall advancement of the school.

### Takeaways

- Learn how to use demographic and psychodemographic data to profile current families and target prospective ones
- Analyze your approach to enrollment budget-setting
- Fully understand mission-advancing financial aid
- Create an enrollment management plan for your school
- Develop effective marketing strategies leveraging your school's mission aid community
- Break through silos and partner with development, marketing, and communication to advance your mission
- Cultivate mission-serving relationships that promote long-term commitments to your school
- Help families come to terms with “best fit” in a market of independent school choices

### Tuition Information

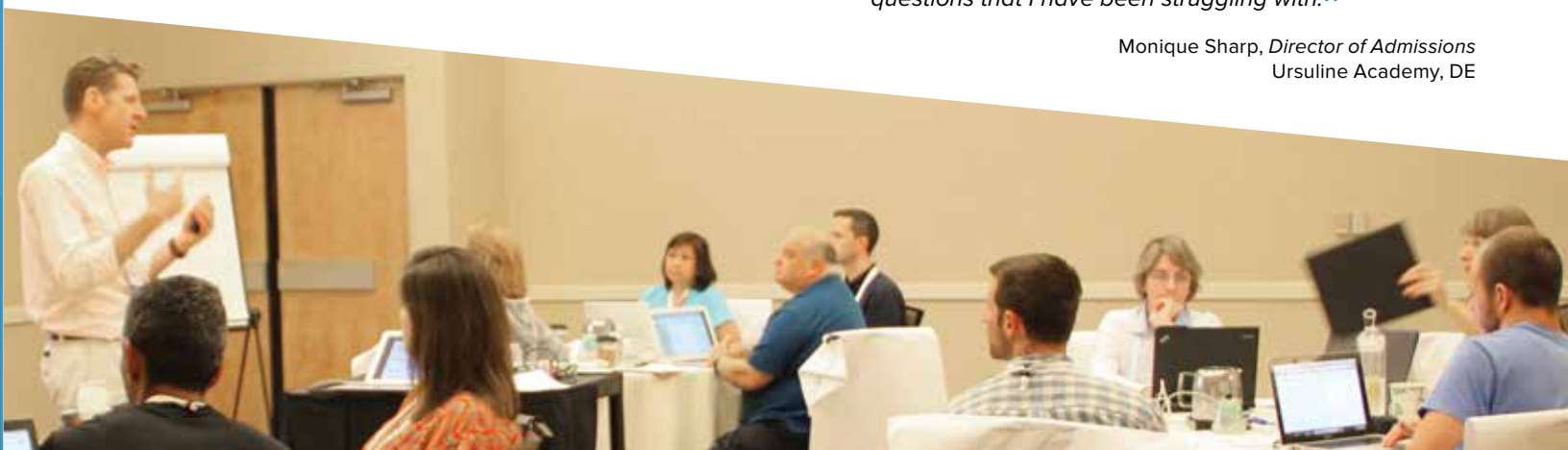
Gold Member: \$2,314 or free with 10 Consortium Credits

Nonmember: \$2,722

**Bring your team!** Pay only \$2,227 for each additional participant from your school. Call 302-656-4944 to register.

“I received an amazing wealth of information— a great foundation. This workshop helped me with so many questions that I have been struggling with.”

Monique Sharp, Director of Admissions  
Ursuline Academy, DE





## Build Your Summer Program Into a Measurable Asset

WILMINGTON, DE

October 5–8 | 30 IACP CREDITS or

November 9–12 | 30 IACP CREDITS [isminc.com/iacp](http://isminc.com/iacp)

Led by: Simon M. Jaynes, IAP-L • 13th year leading  
Senior Consultant, ISM

### TOPIC FOCUSED

*This workshop is ideal for Summer Program Directors, who will walk away with positive strategies for developing a dynamic summer program.*

A great summer program enhances student recruitment and re-recruitment while giving you a solid source of additional hard income. No matter what your starting point, we'll show you how to build your summer program into a measurable asset by hiring the right staff, creating a realistic budget, offering outstanding courses, using creative marketing, and enlisting the support of the other school administrators

### Takeaways

- Creating and monitoring a budget
- Ways to work with your school's academic-year Management Team
- Building your staff
- How to market your program
- Discover key elements that make your program stand out
- Brainstorming program needs, and possible courses
- Figuring out what plan is best for your school, building it, and sticking to it

### Tuition Information

Gold Member: \$2,314 or free with 10 Consortium Credits

Nonmember: \$2,722

“This was an extremely useful workshop—great content and presentation. I will be taking some terrific ideas and advice back to my school and our summer program will undoubtedly be stronger as a result. The workshop is excellent.”

Kate Angell, Director of Cocurricular Learning  
Elmwood School, ON

## The Double-Edged Sword of Diversity: Reframing Community Life Initiatives in Independent Schools\*

October 24–25 • CHICAGO, IL

January 25–25 • HOUSTON, TX

February 6–7 • SOUTH FLORIDA

February 27–28 • LOS ANGELES, CA

Led by: Derrick Gay • 2nd year leading  
Educational Consultant

### TOPIC FOCUSED

*Anyone interested in fostering a more inclusive independent school community is welcome in this workshop.*

The word “diversity” is often ill-defined, represents a divisive identity, and can create a well-meaning—but unhelpful—“savior” mindset. This workshop facilitates participant-driven reflection and discussion on individual and institutional assumptions, beliefs, attitudes, and behaviors. Finishing this workshop will set your school on the path toward a more inclusive school community.

### Takeaways

- Get concrete resources to inform articulating your vision around diversity and inclusion
- Learn proven, effective community-building practices in other independent schools
- Begin to assess your school's needs and potential resources to realize your community goals
- Learn more about your own identity and how you perceive other's insights that foster an inclusive environment
- Join networks of other independent school educators to reflect on these issues of community life

### Tuition Information

Gold Member: \$2,314 or free with 10 Consortium Credits

Nonmember: \$2,722

**Bring your team!** *This workshop is ideal for teams of faculty/faculty leaders learning together. Pay only \$1,114 for each additional team member. Call 302-656-4944 to register.*

*\*Dates are tentative, and subject to vary slightly. Call 302-656-4944 for details and to register.*

“This was an eye-opening experience. The exercises were my favorite takeaways.”

Brad Schultz, Early Childhood/Elementary Principal  
Greater Atlanta Christian School, GA

## Strategic Financial Planning: Skills and Implementation

HOUSTON, TX

January 14–15, 2017 (weekend workshop)

20 IACP/20 BCP CREDITS [isminc.com/iacp](http://isminc.com/iacp) | [isminc.com/bcp](http://isminc.com/bcp)

Led by: Walker Buckalew, PhD • 29th year leading  
Executive Consultant, ISM

### TOPIC FOCUSED

*New and veteran Board Presidents, Chairs of the Finance Committee, and other key Board committee leaders as well as School Heads, Business Managers, and other senior administrators should attend this workshop.*

Increased cash reserves. Higher enrollment levels. Long-term viability. These are the goals at every school—and they are attainable if you have the right strategic financial plan. ISM's proven approach to strategic financial planning will help you experience financial success now, while positioning your school strongly for the future.

### Takeaways

- ISM's 13-line format for organizing your highest-impact strategic numbers into a user-friendly progression intelligible to all your Board members and senior administrators
- Your self-scoring on the 18 ISM Stability Markers™ and a clear sense of what that score implies for your school's future
- ISM's system for constructing a strategic plan/strategic financial plan to serve as your six-year framework for operations and operations finance

### Tuition Information

Gold Member: \$2,314 or free with 10 Consortium Credits

Nonmember: \$2,722

**Bring your team!** Pay only \$1,114 for each additional team member attending with you. Call 302-656-4944 to register.

**“** I really enjoyed this workshop: it was clear and straightforward. I felt like the facilitator was informative and valued the time of the participants in making every moment of the workshop thoughtful and relevant. **”**

Justin McLean, Director of Multicultural Affairs  
Meadowbrook School of Weston, MA

## Student-Centered Scheduling

WILMINGTON, DE

January 22–28, 2017

Led by: Bryan Smyth, PhD • 3rd year leading  
Consultant, ISM

### TOPIC FOCUSED

*Middle and Upper School Schedulers and leadership should attend this workshop.*

A school's schedule is not just tactical; it is a statement of the school's mission and philosophy reflected in how you use time, people, and space to facilitate your pedagogy and deliver your program.

Take this workshop if you want to know how your schedule can help to facilitate the best learning experience for students and if you want to:

- Reduce the frenetic pace of day
- Give your students exactly the classes they want
- Fit in the program you want to deliver
- Change your schedule design to better reflect how you want to teach
- Carve out meaningful teacher collaboration time
- Experience scheduling without conflict!

### Takeaways

- The best strategy for scheduling your school without conflict
- The latest research and theories for scheduling the modern school
- Clear direction to improve the design of your school's schedule

### Tuition Information

Gold Member: \$4,371 or free with 20 Consortium Credits

Nonmember: \$5,142

**Bring your team!** Pay only \$3,133 tuition for each additional participant from your school. Call to register, 302-656-4944.

**“** So much information! There is no way you could walk away without finding a schedule that would work for your school. I loved the open atmosphere for sharing. **”**

Libby Conder, Assistant Head of Middle School  
Episcopal School of Dallas, TX

Check [isminc.com](http://isminc.com) for workshop news.

Visit [isminc.com/syw](http://isminc.com/syw) to register  
or call us at **302-656-4944**.

# Summer Institute & School-Year Workshop Leader Bios

**Barbara Beachley**, *Consultant and Director of Survey Research, ISM*

Barbara has worked in education since 1997. She served as an ESL and adult literacy teacher through an outreach program at Boston University (MA) and an upper school modern language teacher at the MacDuffie School (MA) and Collegiate School (VA). Before joining ISM, she was Academic Dean at Cape Henry Collegiate School (VA), where she oversaw curriculum and professional growth in grades Pre K–12.

**Ashanti Bryant**, *Middle School Principal, Grand Rapids Christian School, MI*

Ashanti holds a bachelor's degree in Elementary Education; a master's of Social Work in Policy, Planning & Administration; and a master's in Educational Administration. A graduate and fellow of New Leaders for New Schools, Ashanti is a passionate advocate for school reform, school improvement, and educational equity. He serves on the Board of several charter schools and consults with several organizations and agencies involved in youth development and student support programming.

**M. Walker Buckalew**, PhD, *Executive Consultant, ISM*

Schools benefit from Walker's experience as an ISM Consultant, in school and university administration, and in his national research into the factors that make schools successful in maintaining and retaining high academic performance. At ISM, Walker has developed expertise in strategic performance analyses, long-range planning, and Board workshops. He has been instrumental in developing ISM's approach to strategic financial planning, as well as growth-focused teacher evaluation.

**Darlene Caraway**, *Assistant to the Head, Greenhill School, TX*

Darlene has held her current position for 36 of her 39 years at the school. She has worked and led workshops in the US and Europe in a variety of environments, and knows the contributions that an effective assistant makes to an organization and to the School Head.

**Kathy Christoph**, *Middle School Principal, Dwight-Englewood School, NJ*

An ISM workshop instructor since 1995, Kathy has served as the Head of Pen Ryn School (PA), and Head of the Middle School at Columbus School for Girls (OH) and The Tatnall School (DE). She provided leadership and her special expertise in change initiatives around issues pertaining to adolescents. Under her direction, each school developed a mission and framework that reflect best practices of exemplary middle schools.

**Jessica Clark**, *Dean of Students, National Cathedral School for Girls, DC*

National Cathedral School for Girls has been Jessica's professional home for the last 12 years. In this role, she serves as Dean of Students for grades 9–12, as well as Director of the Center for Ethical Leader and Service (a role that serves students in grades 4–12, as well as faculty and staff). Prior to stepping into her role as Dean, Jessica taught biology, chemistry, and several science electives both at NCS and at the Taft School in Watertown, CT.

**Steve Colflesh**, CMAA, *Retired Athletic Director, Seabury Hall, HI*

Steve is a Certified Master Athletic Administrator (CMAA). Beginning his career in 1971 as a physical education, math, and driver's education teacher, he has been a head coach for football, volleyball, basketball, baseball, and track and field. He has presented at the National Interscholastic

Athletic Administrators Association and also sat on their Professional Development Committee.

**Roger Dillow**, MA, MSW, *ISM Adjunct Consultant*

During his career of over 40 years, Roger has been an educator, consultant, and mental health professional. He has been teacher, athletic coach, advisor, and administrator at four independent schools; a mental health counselor and consultant at three independent and two public schools; an instructor of family systems theory and its applications at two universities and a psychotherapy training center; and a psychotherapist in agency and private practice.

**Mark Engstrom**, Certified Blended Learning Designer, *Head of Middle and Upper School, Allen Academy, TX*

Mark is now the Head of Middle and Upper School at Allen Academy in Bryan, TX. He moved into administration in 2011 at Graded—The American School of São Paulo, in Brazil, where he was an Assistant Principal for four years. Mark has led teachers and teacher leaders through the blended learning process through workshops, conferences and online classes, and has multiple blog posts outlining many of those experiences.

**Brian Fulmer**, *Director of FAST® and Financial Aid Consultant, ISM*

Brian, who wrote ISM's FAST software, is well-versed in the workings of financial aid and how schools can best use their dollars for the most impact. Brian has sat on several financial aid committees from a diverse selection of schools, and has trained hundreds of others on the FAST system. He leads FAST training and financial aid policy workshops throughout the year.

**Derrick Gay**, *Educational Consultant*

Derrick spent 18 years building private-independent school communities around the world as a teacher, Dean of Students, and Director of Community Life and Diversity. Now, he serves as a resource to schools domestically and abroad to foster more inclusive communities. Derrick is currently part of the doctoral program at the University of Pennsylvania, studying Educational Leadership.

**Mike Gwaltney**, *Chair of the PK–12 History Department, Oregon Episcopal School, OR*

In his 24th year as a classroom teacher, and tenth year as a Department Chair—including six years as Department Chair at Chaminade College Preparatory (CA)—Mike is an experienced independent school leader and public speaker. As one of the earliest teachers with the Online School for Girls, Mike has helped pioneer online learning for independent schools, and frequently speaks at conferences and to faculty groups about the role of online and blended learning in secondary schools.

**Susan Hazell**, IAP-S, CFRE, *Director of Development, Ridley College, St. Catharines, ON*

Susan has developed policies for substance use and abuse, harassment, crisis management, and emergency protocol plans, and has written residential-faculty and student handbooks. She has also served as Executive Director of Advancement at Collingswood School; Assistant Head, School Life at Lakefield College School; Dean of Residence at the Bishop Strachan School; and as a housemaster, teacher, coach, and Admission Officer at Ridley College. She also serves on the ISM Advancement Academy faculty.

**Roxanne Higgins**, *President and Senior Consultant, ISM*

Roxanne became President of ISM in 1990. She is responsible for the overall operation and management of the company—and is also an ISM Senior Consultant and instructor. She works with approximately 30 schools per year in on-site schedule design analysis and creation. Roxanne has worked with over 200 schools in on-site consultations and over 500 schools in ISM's scheduling workshops.

**Stewart Howard**, *Director of Buildings and Grounds, Norfolk Academy, VA*

Stewart has been in facilities administration for the past 24 years, and has been with Norfolk Academy since 2004. He oversees the operation of its 72-acre campus including 18 buildings, eight faculty houses, multiple athletic fields, and an aquatic center. Stewart has successfully managed several multimillion-dollar capital improvement projects.

**Diane Hunt**, *Lower School Head, Charles Wright Academy, WA*

Diane served as Head of the Middle School at Charles Wright Academy (WA) for 19 years, prior to being named Head of the Lower School at Charles Wright in 2006. While Head of the Middle School, she taught math and was Chair of the performing arts department. She also stepped in as Interim Head while the School Head was on sabbatical for a year.

**Simon Jeynes**, IAP-L, *Senior Consultant, ISM*

Simon joined ISM in 2003 after 26 years in independent education as a teacher and administrator, with 10 years as a Head of School. He consults and delivers workshops on the topics of faculty culture, faculty evaluation, faculty and marketing, Board development, strategic planning and strategic financial planning, scheduling, and strategic performance. He writes for ISM publications and co-convenes the ISM Advancement Academy.

**Andy King**, *Upper School Director, Hackley School, NY*

Andy joined the faculty of Hackley School in 1998 as a history teacher, admissions associate, coach, academic advisor, and boarding associate. In 2008, Andy was appointed Upper School Director. In this role, Andy leads a division of approximately 400 day and five-day boarding students and 70 faculty and staff. He also has been involved with specific projects including the implementation of a new daily schedule, the development and adoption of a new academic calendar, and the rollout of an Upper School iPad initiative. He co-leads the transition committee for Hackley School's new Headmaster.

**Jenny Knight**, *Lower School Director, Miami Country Day School, FL*

Jenny brings passion to learning, teaching, and leadership. In addition to leading the Lower School, she is also the facilitator of the school's strategic plan initiative. She is responsible for weaving the diverse voices of the school's community into a vision for the future. She works with the Board-level Financial Sustainability Committee and, together with two other colleagues, Jenny researched, planned, and implemented her school's Professional Growth and Compensation initiative.

**Susan B. Lair**, PhD, *Head of School, St. Francis Episcopal Day School, TX*

Susan's background spans 43 years in education as a teacher and administrator in both private and public schools. As Head of School at St. Francis, she has notably improved faculty and student retention, resided over record annual giving, spearheaded the addition of a much-needed 24-acre second campus, and is currently driving a capital campaign that will allow St. Francis to realize its longstanding dream of a high school.

For a full-length bio, please visit the course pages on [isminc.com/workshops](http://isminc.com/workshops) and click on the **Leader** tab.

**Merritt Livermore**, *Head of Upper School*, McDonogh School, MD

Merritt became McDonogh's Head of Upper School in 2014. A McDonogh alumna, she has helped run the Middle School at McDonogh as both Dean of Students and Associate Head since 2004. Among her responsibilities in the Middle School was overseeing the advisory program.

**Michael Larson**, *IAP-S, Director of Advancement*, The Fay School, TX

Michael Larson joined The Fay School in 2007 as Director of Advancement and serves as a member of the leadership team. Michael oversees development, volunteer services, and communications. Through Fay's inclusive approach to Advancement, Michael also manages other non-instructional front line services including campus technology, extended day, reception and health services. Michael also coordinates the school's Advancement Team.

**Jim MacLaughlin**, *10th Grade Dean*, Pingree School, MA

Jim has served 27 years at the Pingree School (MA) as a teacher, coach, and tenth grade dean. As Grade Dean, Jim served as a member of the Discipline Committee, planned grade level events for orientation and socializing, aided with adjustments and implementation of school rules and policies, and designed age-appropriate community education.

**Maria Madden**, *CFRE, IAP-L, Middle School Dean of Student Life for Girls*, The Lovett School, Atlanta, GA

Maria has been teaching Middle School Spanish since 2007 at The Lovett School and has coached cross-country and track. While at Lovett, Maria has earned both her master's, and EdS degrees in Educational Leadership, both from Kennesaw State University. Maria has been Dean of Students since 2012, and attended the ISM Dean of Students workshop in 2012. Maria is a product of independent schools, attending St. Joseph's Catholic School in Marietta, GA (K-6) and then The Walker School in Marietta, GA (7-12).

**L.J. Mitchell**, *IAP-L, Adjunct Advancement Consultant, ISM | Director of Advancement*, Little Red School House & Elisabeth Irwin High School, NY

L.J. joined LREI, a 14-year progressive program for 650 students, in July 2014. In his first year, the annual fund exceeded its \$1.25M goal and total annual giving exceeded goal by 30%. From 2013-14, L.J. was Director of Development at Seacrest Country Day School, a PK-12 school for 450 students in Naples, FL. One year under L.J.'s leadership, the annual fund increased 185%. Prior to joining Seacrest, he was the Director of Development for Mary McDowell Friends School in New York City. Upon joining the school in 2008 as its first Director of Development, the annual fund doubled and the school tripled the number of six-figure campaign gifts. He is a founding member of the Advancement Academy Faculty.

**Joseph Moody**, *Middle School Dean of Student Life for Boys*, The Lovett School, Atlanta, GA

Joseph has been an educator since graduating from Presbyterian College in Clinton, SC, in 1994. He taught and coached in public high schools in Georgia for 16 years before becoming a Middle School science teacher at The Lovett School in 2010. After three years, Joseph transitioned to the role of Middle School Dean of Student Life for Boys. In that role, Joseph has been able to focus on improving student programs such as 8th grade leadership and service days, and mentoring.

**Terry L. Moore**, *BCP-E, Executive Consultant*, ISM

Terry, an ISM consultant since 2002, has a wealth of experience with several entrepreneurial ventures from which he gained practical, creative skills in operational management. His professional background in insurance, purchasing, budgeting, marketing, and fiscal oversight qualify him to consult with independent schools and their specialized needs. In addition to serving schools on-site, he leads ISM's Business and Operations Academy.

**Patty Myler**, *Retired Facilities Director*, Stone Ridge School of the Sacred Heart, MD

Patty brings 25 years of facilities administration experience to ISM. Since 1992, Patty had overseen the operation of her school's 36-acre, K-12 campus, incorporating 12 buildings, a natatorium, and multiple playing fields. Previously, Patty spent 10 years in commercial property management with the CES Companies and managed two large racquetball and health clubs.

**Mary Jo Pruitt**, *Director of Athletics*, Castilleja School, CA

As Director of Athletics at Castilleja School in Palo Alto, CA., Mary Jo oversees the daily operations of the upper school and middle school athletic teams, which include 11 upper school sports and 10 middle school sports. Prior to Castilleja, she served as the Assistant Coach for the Stanford cross country and track & field teams. Her past Stanford experiences included working as an Assistant Director of Compliance Services, Recruiting, and Director of Operations for track and field and cross country.

**Amy Riley**, *IAP-S, Consultant and Academic Dean of IACP*, ISM

Amy has been involved with ISM since 2011, when she joined the faculty of the ISM Advancement Academy, teaching sessions involving admission, the admission/development partnership, communication skills, effective referrals, financial aid, and data management. In 2013, she joined ISM as a full-time Consultant and as the Academic Dean of ISM's International Advancement Professional Certification Program.

**Penny Rogers**, *IAP-L, Director of Admission and Marketing*, Academy at the Lakes, FL

Penny serves on the Academy at the Lakes senior leadership team and oversees both the admissions and marketing/communications departments. Previously, she was the Director of Strategic Communications at Ravenscroft School in Raleigh, NC. She managed the overall direction of schoolwide communications including messaging, branding, publications, e-communications, social media, crisis communications, and media and community relations. Penny is a founding member of the ISM Advancement Academy faculty.

**Steve Salvo**, *IAP-S, Assistant Head for Advancement and Enrollment*, Trinity Episcopal School, LA

Steve began his independent school career in 2000 as a math teacher, dorm parent, and coach at the Indian Mountain School (CT), and continued as teacher, middle school mathematics department coordinator, and Director of Summer Sports Programs at Flint Hill School (VA) until assuming his current role, Trinity's advancement leader, in 2012. As well as being an adjunct faculty member for ISM's Admission workshop, Steve has presented at SSATB and Independent Education conferences.

**Paula A. Schwartz**, *EdD, IAP-L, Senior Consultant*, ISM

Paula is a development professional with more than 25 years of experience working in education and with nonprofit organizations and companies to create and expand program, development, and fundraising initiatives. As the leader of ISM's development services since 2003, she supports private-independent schools in a myriad of ways. She is co-convenor of the ISM Advancement Academy.

**Bill Shelnett**, *Head of School*, St. Luke School

Since 2001, Bill Shelnett has held senior leadership positions at several Atlanta-area independent schools, including Holy Spirit Preparatory School, Brandon Hall School, and Mount Pisgah Christian School. Bill's first tenure as a Head of School was at Wildwood Christian Academy, north of Atlanta, GA. He is currently the Head of School at St. Luke School, a K-8 school with an enrollment of 600 students, in Columbus, GA.

**Bryan Smyth**, *PhD, Consultant*, ISM

Bryan joined ISM in 2013, following 13 years in independent school administration. His central purpose is to help students flourish. He believes that the enhancement of school environments and cultures is the best way to facilitate growth in children and adults. Bryan conducts on-site scheduling consultations, having had extensive experience creating and implementing unique daily schedules and annual calendars for both boarding and day schools.

**Herbert P. Soles**, *CFRE, IAP-L, Assistant Headmaster for Development*, Norfolk Academy, VA

Herb has 40 years of independent school experience that includes being a teacher, coach, administrator, and fundraiser. He has coached advancement teams that have twice been recognized by CASE in the Achievement in Mobilizing Support Award competition, as well as garnering six awards in alumni participation, publication improvement, and fundraising management. He is a founding faculty member of the ISM Advancement Academy.

**Matthew Stuart**, *Head of School*, The Caedmon School, NY

Matthew served as Head of Middle School at The Town School (NY) before joining Caedmon. Additionally, he was Director of the Middle School at the National Cathedral School (DC) from 2002-2006, and a Department Head at The Spence School (NY), directing a K-12 performing arts department. Selected as a Joseph Klingenstein Fellow in 1998-99 and a NAIS/E.E. Ford Fellow in 2004, Matthew has presented at a number of conferences, including NAIS, NYSAIS, AIMS, ACIS, and NAES.

**Toni Swan**, *BCP-E, Director of Operations and Finance*, Athens Academy, GA

Toni has served as the Director of Operations and Finance at Athens Academy since 1999, and has oversight of the 158-acre campus with buildings totaling 287,220 sq. feet. Her experience in accounting and accounting instruction include auditing and governmental financial accounting. Toni has served as a lecturer in financial, managerial, and honors accounting at the University of Georgia. She is the co-convenor of the Business and Operations Academy.

**Scott Winham**, *Upper School Head*, Seabury Hall, HI

Scott has been an educator since his graduation from MIT in 1993. Beginning his career teaching and coaching in a public school in Woodstock, VT, Scott transitioned to the independent school scene in 2000, taking a position as a math teacher at Seabury Hall in Maui, HI. After two years, Scott assumed the role of Dean of Students, where he was able to work to improve student programs, including the advisory program. Now, as Upper School Head, Scott maintains his focus on the advisory program.



## International Advancement Certification Program™ *for Advancement Professionals in Independent Schools*

Independent School Management, Inc., offers the only interdisciplinary set of credentials that **recognizes learning** across the areas of **admission, development, and marketing communications** in private-independent schools through its **International Advancement Certification Program (IACP)**.

Practicing professionals in the field at private-independent schools may earn certification. The process ensures common standards, and inspires and supports professional development throughout the industry. It gives schools a way to move members of their Advancement Teams to higher levels of achievement.

IACP offers three levels of certification based on progressively increasing requirements—Professional (IAP), Senior (IAP-S), and Leader (IAP-L).

### **Be on the “cutting edge” of best practices.**

Certification requires continuous studying, training, and putting best practices into place.

### **Expand your career opportunities.**

Certification identifies you as an individual who is valuable both in your current school and to future employers within admission, marketing and communications, and development.

### **Prepare yourself for greater responsibilities by enhancing your skills.**

Certification reflects your willingness to invest in your career and prepares you to take on the next level in your career.

### **Showcase your achievement.**

Certification is a reflection of your dedication to your school and confirms that you are meeting performance standards requirements.





# Advancement Academy

ADMISSION | DEVELOPMENT | MARKETING COMMUNICATIONS

**JULY 25–29 • THE OMNI PARKER HOUSE • BOSTON, MA**

 #ISMINCaa16 Join the conversation.

## Advancement Academy Faculty

ISM is privileged to bring together distinguished members of the private school advancement community as faculty members and mentors for ISM's learning events. Faculty members represent each of the specialty areas within advancement, have served in leadership capacities in private-independent schools for many years, and are recognized as exemplary members of the profession by their peers.

- Greg Abel, IAP-S | *Director of Marketing and Communications*, Chapel Hill – Chauncy Hall School, MA
- Michael Christopher, IAP-L | *Assistant Headmaster for Development*, Lausanne Collegiate School, TN
- Jim Hamilton, IAP-S | *Associate Head of External Affairs*, Brooks School, MA
- Susan Hazell, IAP-S, CFRE | *Director of Development*, Ridley College, ON, Canada
- Philip C. Higginson, IAP-L | *Assistant Head of School for Institutional Advancement*, Ravenscroft School, NC
- Neil Isakson, IAP-S | *Director of External Communications*, Worcester Academy, MA
- Simon Jeynes, IAP-L | *ISM Senior Consultant, ISM Advancement Academy Co-Convener*
- Michael Larson, IAP-S | *Director of Advancement*, The Fay School, TX
- L.J. Mitchell, IAP-L | *Director of Advancement*, Little Red School House & Elisabeth Irwin High School, NY
- Amy Riley, IAP-S | *ISM Consultant, Academic Dean for IACP*
- Penny Rogers, IAP-L | *Director of Admission & Marketing*, Academy at the Lakes, FL
- Paula Schwartz, EdD, IAP-L | *ISM Senior Consultant, ISM Advancement Academy Co-Convener*
- Herbert P. Soles, IAP-L, CFRE | *Assistant Headmaster for Development*, Norfolk Academy, VA
- Gigi Tysinger, IAP-S | *Director of Advancement Services*, Norfolk Academy, VA



# Refocus yourself at the Advancement Academy

Leave with cutting-edge advancement theory, practice, and a plan to implement.



ISM Advancement Academy earns you 40 credits toward ISM's International Advancement Certification Program. For more information, visit [isminc.com/iacp](http://isminc.com/iacp)

For five days, you and your team will be immersed in an intense professional-growth experience, guided by expert practitioners, designed to send you back to campus with an integrated advancement plan ready for implementation. Coming as a team, you will coordinate an entire year's strategy. If you're a one-person shop, you will benefit from a network of professionals as you conceptualize a "team" approach to empower your school. As an individual attendee, you will strengthen your team orientation to amplify your advancement efforts.

## 2016 Advancement Academy Snapshot:

- Create a tangible plan that will drive your school forward, using your own school's data
- Gain mastery through intense discussion and in-depth learning
- Work one-on-one with your mentor to map your week and your plan
- Become part of a network of high-performing advancement peers who serve as an ongoing support system throughout your career

## Who Should Attend:

The Academy is a must for experienced advancement administrators—Heads, Advancement Officers, Admission Directors, Development Directors, and Marketing Communications professionals—people who:

- Lead in their area and thrive in a strategic role
- Persistently seek best practices and industry-leading approaches to deliver measurable results
- See patterns where others simply see complexity

## ALUMNI:

You have new goals and perspectives; we have new insights. It's why alumni come back year after year.



Your path starts here!

7/25

## Use assessment tools to discover where you are.

Uncover your strengths and hidden weaknesses by measuring yourself with the ISM assessment tools—advancement, admission, development, and marketing communications—so you can focus on what needs to be addressed.

## ANALYZE

- ASSESS STRENGTHS and WEAKNESSES
- IDENTIFY YOUR NEEDS

## Map your week with your mentor.

With your assessment results, you'll work with your mentor, either as an individual or as part of your team, to formulate how you can best utilize your time at the Academy. Together, you'll choose courses that address "needs areas" identified in your assessment.

## SET GOALS

CHOOSE YOUR LEARNING PATH



NETWORK & SOCIAL HOUR

7/26



WORKSHOP SESSION



Paige Holmes @paigeholmes29

What a great 1st day!!! Looking forward to learning more & meeting other development professionals this week! #day1success #ismincaa15 Jul 27 2015, 6:26pm

“The Academy was useful to every member of our team who was present and for me as Head. The week gave us time to hear ideas and then to process them and think about how to apply them. That we were also able to spend some time as a team working—and a great deal of time bonding and sharing meals together—was a HUGE benefit. Thank you for not over-programming so that we could have some time together.”

Dale Johnson, Head of School  
The Field School, Washington, DC

KEY:



WORKSHOP SESSIONS



MENTOR SESSIONS

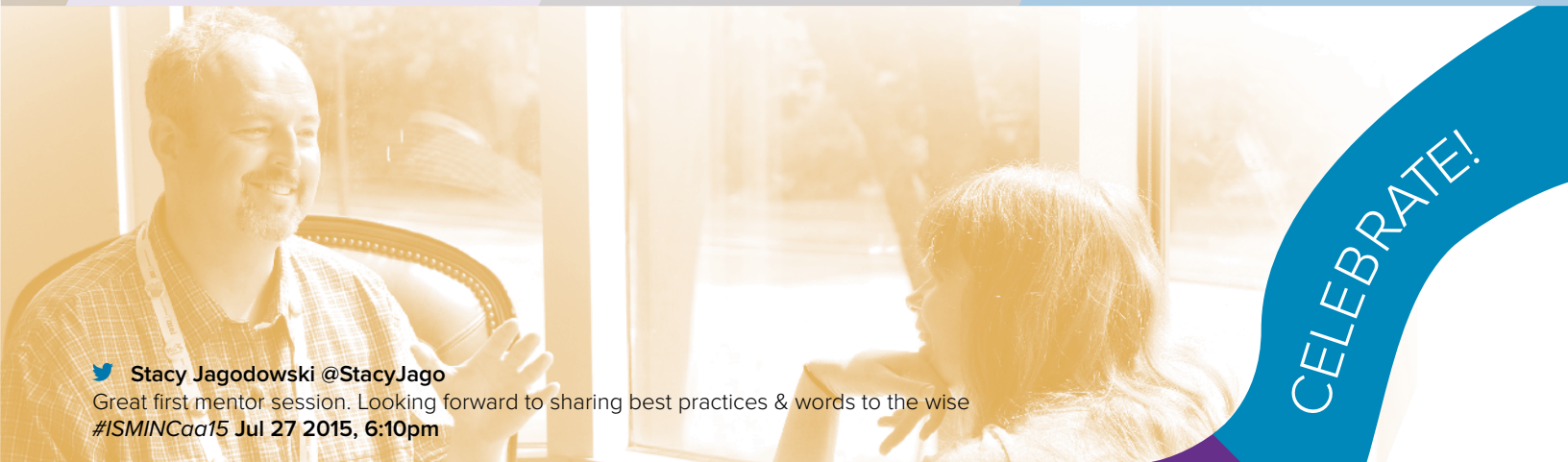


NETWORK & SOCIAL HOUR

Workshops include teaching, collaborative investigation, and application. The workshops you attend will engage and deepen your practice.

The Academy faculty members personalize your experience with daily mentoring sessions. Your mentor will keep you focused along your learning path—both in Boston and once you return to your school.

Meet like-minded professionals from North America and around the world; share your experiences; laugh and commiserate together!



Stacy Jagodowski @StacyJago

Great first mentor session. Looking forward to sharing best practices & words to the wise #ISMInCaa15 Jul 27 2015, 6:10pm

CELEBRATE!

### DELIVER

ACTION PLAN PRESENTATION and PEER REVIEW



REFLECTING and FINALIZING

### It's time to deliver!

With the week winding down, now is the time to share your Academy accomplishments. Working alongside your mentor, you'll prepare a presentation for your peers outlining your goals and plans for moving forward. This is a time for reflection and obtaining valuable, organized feedback.

### Celebration and Certification

You did it! Now, celebrate your accomplishment! All those who have completed the requirements for the International Advancement Certification Program will receive their certificates.

7/28 TIME TO ABSORB, REFLECT, ENJOY, & RELAX

### Lunch Break Affinity Tables

This year, even lunch hour will offer learning opportunities! Both Academy leaders and participants will host "topic tables" during lunch. Join discussions to offer perspective and gain insight.

## Join us in Boston!

### TUITION:

Consortium Gold \$3,254 // \$2,929 (Early Bird)

General \$3,862 // \$3,476 (Early Bird)

Team Pricing \$2,842 (second person +)

To register your team, call 302-656-4944

Your tuition includes workshop materials, breakfasts, breaks, three lunches, social hours, and one dinner.

Book your room at the Omni Parker House in Boston, MA, for the ISM rate of \$205 per night. Room block rate deadline is June 23.

Register today!

➔ [isminc.com/academy](http://isminc.com/academy)

☎ 302-656-4944

Don't miss out on **Early Bird** pricing! Available through April 15, 2016.



# ROI



*prestige  
recognition  
authority  
experience*

*confidence  
empowerment  
connections  
support*

*strategy  
excellence  
insight  
compliance*



## **Business Certification Program™** *for Business Officers in Independent Schools*

The most rewarding investment is the one you make in **yourself.**

Working through the ISM Business Certification Program, you will achieve professional excellence while gaining experience, learning new skills and strategies, keeping pace with evolving trends, and growing your professional network.

BCP offers three levels of certification based on progressively increasing requirements—Professional (BCP-P), Senior (BCP-S), and Executive (BCP-E).

# Business and Operations Academy

FINANCE | OPERATIONS | FACILITIES

OCT 16–20 • THE FAIRMONT • NEWPORT BEACH, CA

 #ISMINCboa16 Join the conversation.

## Business and Operations Academy Faculty

ISM is privileged to bring together distinguished members of the private school community as faculty members and advisors for ISM's learning events. Faculty members represent each of the specialty areas within, have served in leadership capacities in private-independent schools for many years, and are recognized as exemplary members of the profession by their peers.

Terry Moore, BCP-E | *Convener, ISM Executive Consultant*

Toni Swan, BCP-E | *Co-convener, Director of Operations and Finance, Athens Academy, GA*

Jerry Chambers, BCP-E | *Chief Financial Officer, The First Academy, FL*

Karen Illig, BCP-E | *Vice President of Financial and Support Services, Pine Crest School, FL*

Brent Ivey, BCP-E | *Chief Business Officer, Atlanta Girls' School, GA*

Lee Jones, BCP-E | *Director of Finance, Regents School of Austin, TX*

Janet Koller, BCP-E | *Vice President, Finance and Operations, Chaminade College Preparatory School, CA*

Janet Refior, BCP-E | *CFO/Business Manager, Fountain Valley School of Colorado, CO*



# Bring your mission to life at the Academy

*Leave with cutting-edge theory, practice, and a plan to implement.*



ISM Business and Operations Academy earns you 40 credits toward ISM's Business Certification Program. For more information, visit [isminc.com/bcp](http://isminc.com/bcp)

Behind every successful school there is a great finance and operations team—or a team of one. The ISM Business and Operations Academy is designed for you to build on your experience, tackle your challenges, and reignite your passion for delivering your school's mission. You will spend five days in an intense learning environment designed to focus on your specific needs and your own school's data, with expert guidance from our exemplary faculty from private-independent schools coupled with peer support. It's a professional learning experience like no other with residual impact for years to come.

## 2016 Academy Snapshot:

- Create a tangible plan that will drive your school forward, using your own school's data
- Gain mastery through discussion and in-depth learning following the track most appropriate for your professional development
- Work one-on-one with your mentor to map your week and your plan
- Become part of a network of high-performing peers who serve as an ongoing support system throughout your career

## Who Should Attend:

The Academy is a must for experienced business administrators—Business Managers, CFOs, Operations Managers, Facilities Managers, HR professionals—people who:

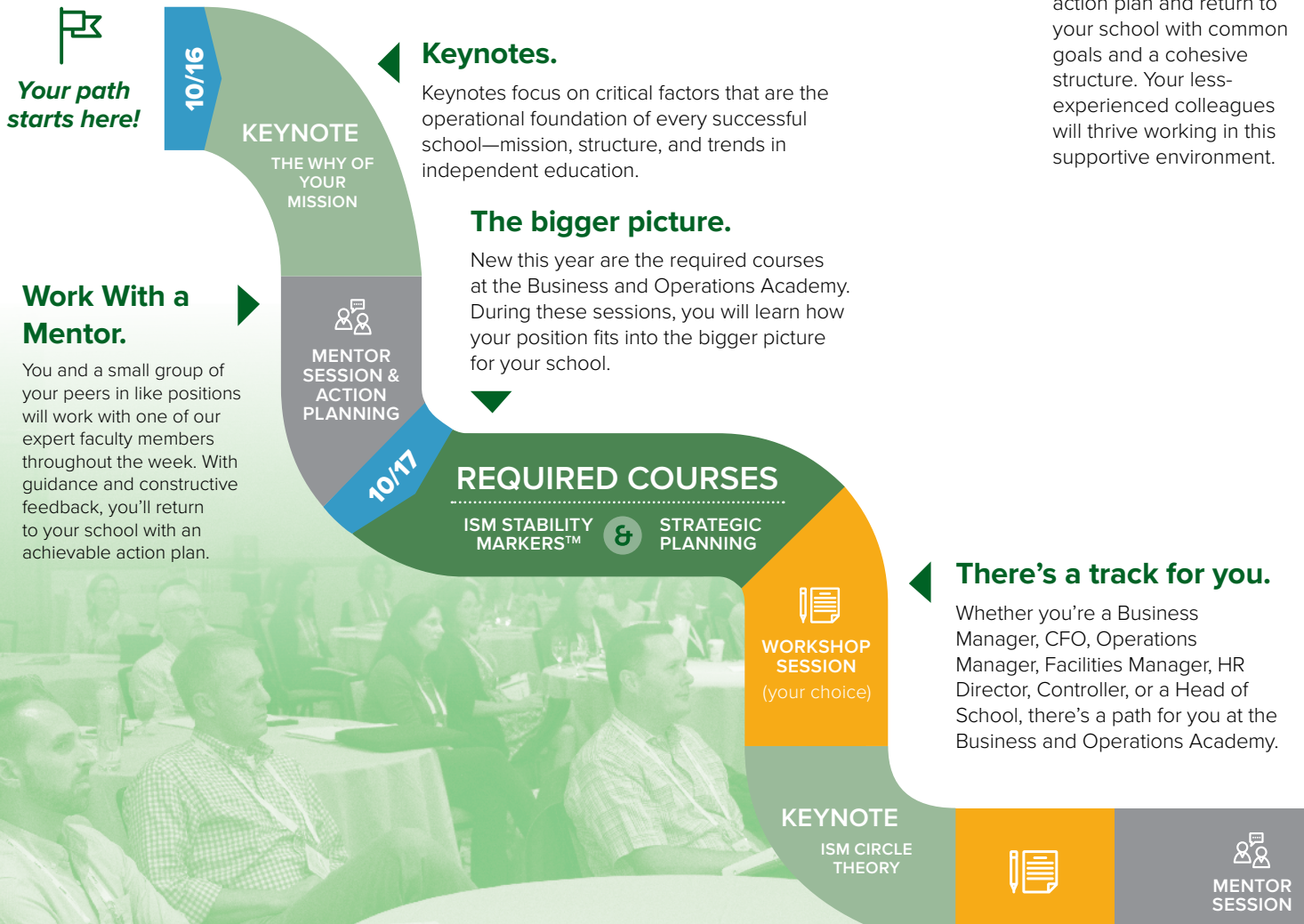
- Lead in their area and thrive in a strategic role
- Persistently seek best practices and industry-leading approaches to deliver measurable results
- Are passionate about building on their own skills and amplifying their performance for the benefit of their school, team, and ultimately their students

## ALUMNI:

You have new goals and perspectives; we have new insights. It's why alumni come back year after year.

## Bring your team.

This experience is ideal for your team. Together, you will work on your action plan and return to your school with common goals and a cohesive structure. Your less-experienced colleagues will thrive working in this supportive environment.



KEY:



WORKSHOP SESSIONS

Workshops include teaching, collaborative investigation, and application. The workshops you attend will engage and deepen your practice.



MENTOR SESSIONS

The Academy faculty members personalize your experience with daily mentoring sessions. Your mentor will keep you focused along your learning path—both in California and once you return to your school.



NETWORK & SOCIAL HOUR

Meet like-minded professionals from North America and around the world; share your experiences; laugh and commiserate together!



### Ask the Teachers.

We will have a roundtable discussion with all of the faculty. This is your chance to ask the consultants any questions you still have.

### Reflect and Recharge.

One of the most important parts of the Academy is your free afternoon to relax and reflect on all that you have learned so far. You can also take this time to work on your action plan privately.

### It's time to deliver!

The week is almost over and it is time to prepare a presentation to your peers, helping to encapsulate where you are going. This is a great opportunity to reflect on what you are going to do and receive valuable and organized feedback from your peers. One last meeting with your mentor group to reflect on your experience and it is time to celebrate your accomplishment!

### Celebration and Certification

You did it! Now, celebrate your accomplishment! All those who have completed the requirements for the ISM Business Certification Program will receive their certificates.

## Join us in California!

### TUITION:

Consortium Gold **\$3,375 // \$3,038** (Early Bird)

General **\$3,970 // \$3,573** (Early Bird)

Team Pricing **\$2,998** (second person +)

**To register your team, call 302-656-4944**

*Your tuition includes: workshop materials, breakfasts, breaks, three lunches, social hours, and one dinner.*

*Book your room at the Fairmont in Newport Beach, CA, for the ISM rate of \$199 per night. Room block rate deadline is September 16.*

### Register today!

➔ [isminc.com/boa](http://isminc.com/boa)

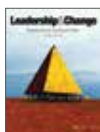
📞 **302-656-4944**



Don't miss out on **Early Bird** pricing!  
Available through July 15, 2016.



# ISM Publications



## Leadership & Change: Perspectives for the School Head 3rd Edition

*Leadership & Change: Perspectives for the School Head* brings you ISM's best training for School Heads—research, evaluation, leadership strategies, and personnel issues.

*Leadership & Change*, a compilation of key articles from ISM advisory letters, provides core knowledge that is crucial for effective management in private schools. This volume gives insight and practical tools to ensure that your school is mission-focused, can implement change, and is planning for future generations of students.

**Consortium Gold: \$28 // Nonmember: \$35**



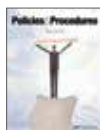
## Sample Employee Handbook: Policies for Private-Independent Schools

*Word® format for ease of customizing*

This wide-ranging resource guide is designed to help private-independent schools develop a legally compliant, comprehensive handbook. Delivered in Word® format for easy cut-and-paste, it offers a step-by-step approach to:

- Federal and state employment laws
- Policies for all schools, as well as policies designed for newer, more established, and highly mature schools
- Acknowledgments and disclaimers

**Consortium Gold: \$279 // Nonmember: \$399**



## Policies & Procedures for Private-Independent Schools 3rd Edition

Written policies and procedures ensure that your school is on mission, abiding by the latest laws, and minimizing risk. *Policies & Procedures for Private-Independent Schools*, a collection of relevant articles from ISM's advisory letters, provides the knowledge and techniques you need in order to review and update your existing policies and develop new ones in the areas of human resources, privacy, safety, finance, gift acceptance, and more.

**Consortium Gold: \$28 // Nonmember: \$35**



## Comprehensive Faculty Development and Teaching Excellence II Package

Faculty development is a key issue and concern at many private-independent schools today. With this in mind, ISM has published two complementary books—*Comprehensive Faculty Development: A Guide to Attract, Retain, Develop, Reward, and Inspire* and *Teaching Excellence II: A Research-Based Workbook for Teachers*—to help schools engage with teachers in a way that enables them to develop and use their talents along lines of excellence for the benefit of their students, colleagues, the school community at large, and themselves.

### THIS PACKAGE INCLUDES:

- » *Two copies of Comprehensive Faculty Development (designed for the academic administrators who supervise, evaluate, and support teachers)*

#### INDIVIDUAL BOOK PRICING:

*Consortium Gold: \$35 // Nonmember: \$49*  
e-pub version available for \$19.99

- » *20 Copies of Teaching Excellence II (workbook for individual teachers)*

#### INDIVIDUAL BOOK PRICING:

*Consortium Gold: \$24 // Nonmember: \$30*

**Consortium Gold: \$424 // Nonmember: \$590**



## Scheduling Without Conflict for Private-Independent Schools

Maximize your school's use of available time, space, faculty, and dollars. That's what a great schedule does!

It is essential that you create a schedule design that complements your school's mission and program, and addresses the needs of today's students and parents.

*Scheduling Without Conflict for Private-Independent Schools*, a collection of key articles from ISM advisory letters, defines the critical components of a strong schedule.

**Consortium Gold: \$28 // Nonmember: \$35**

## The ISM Compendia Series

Each ISM compendium addresses a specific area of Board function or school operation, collecting articles on that topic from ISM's management advisory letters.



### The Head Search Process

A compendium of articles concerning the process of searching for a School Head, and how to handle the transition and its impact in your school. It

features articles such as *The Cost of Changing Heads: Stop the Four-Year Cycle*; *The Search Is On: Identifying and Appointing Your New School Head*; *How to Design a Reasonable Contract for a Head*; and *Head Contract—ISM Model*.

**Consortium Gold: \$32 // Nonmember: \$40**



### Benefit-Oriented Auxiliary Programs: Summer Program and Extended Day

This compendium includes articles such as *The Summer Program*

*Director's Year-Round Administrative Role*; *Build a Summer Program That Works for Your School*; *Design a Benefit-Oriented Summer Program*; and *Determine the True Cost—and Value—of Your Summer Program*.

**Consortium Gold: \$32 // Nonmember: \$40**



### Mission-Based Advisory: A Professional Development Manual

*3rd Edition*

*Mission-Based Advisory* leads faculty advisors through the most important issues they face when delivering a high-quality, professional advisory program. This research-driven, practical, and strategic approach to advisory significantly enhances the individual student's experience and thus your school's ability to recruit and retain families. It provides a comprehensive, how-to perspective on the professional development of advisors, and demonstrates how your advisory program can become truly exceptional. It also includes ISM's Student Culture Profile and essential program tools you can photocopy and use immediately.

**Consortium Gold: \$35 // Nonmember: \$49**





## Facilities Planning and Maintenance for Private-Independent Schools

*Facilities Planning and Maintenance for Private-Independent Schools* pulls together key ISM articles addressing plant and campus management—from determining educational specifications for available classroom space to developing a campus master plan to envisioning your facility needs in coming decades, and much more. Here you will find the core principles for designing and maintaining your facilities and campus—preserving and enhancing your school's unique character and program.

**Consortium Gold: \$28 // Nonmember: \$35**



## Marketing Your School Trilogy

This expanded trilogy of books incorporates ISM's theory and practice in school marketing. Private-independent schools face unique

marketing challenges. ISM's *Marketing Your School Trilogy*, is designed to help you tailor your marketing plan to attract and keep those mission-appropriate students—students who can excel in your school's program and culture.

### TRILOGY INCLUDES:

- » *Marketing Your School: Theory, Planning, and Strategy* › *The essentials to help you develop and implement effective marketing plans and strategies for your school.*
- » *Marketing Your School: Recruiting and Re-recruiting Families* › *Your guide to working with today's demanding families. Strategies designed to attract students—and keep them.*
- » *Marketing Your School: In Print, On Air, and Online* › *Provides techniques for making the best use of your school's publications, website, and advertising programs.*

### INDIVIDUAL BOOK PRICING:

Consortium Gold: \$29 // Nonmember: \$40

**Consortium Gold: \$75 // Nonmember: \$100**



## The Admission Funnel: How to Streamline the Private School Admission Process

Keeping the funnel full—from top to bottom—and free-flowing is the Admission Office's challenge. *The Admission Funnel* walks you through the admission process, step by step, guiding you with practical examples, sample letters, and charts. At each step, you can flip to the Admission Funnel Statistics chart to evaluate your success. Then you can determine where to invest your time, creativity, and budget to boost results.

**Consortium Gold: \$35 // Nonmember: \$49**



## Just for Parents

*Just for Parents* pamphlets are handy guides that answer many of the questions new parents have about a private-independent school education. They're ideal for open houses and admission packets—but we're sure you'll find them useful for many events around your campus.

### CHOOSE FROM THE FOLLOWING:

- » *Why Choose an Independent School*  
*Also available in Spanish*
- » *Welcome to the World of Independent Schools!*  
*Also available in Spanish*
- » *Why Choose a Catholic School*  
*Also available in Spanish*
- » *Why Choose a Christian School*

### TWO WAYS TO ORDER

**Basic: \$1.00 each** (Without school logo: 50 minimum)

**Deluxe: \$1.99 each** (Customized with school logo, color, and contact information: 500 minimum)

[Order at \*isminc.com/bookstore/pamphlets\*](http://order.at.ism.com/bookstore/pamphlets)

For more information, contact us at 302-656-4944 or [justforparents@isminc.com](mailto:justforparents@isminc.com)



## The ISM Strategic Board Series

Buy the entire series for your Trustees and make a significant investment in your Board's education, new-member orientation, and effectiveness. Trustees

armed with *The Strategic Planning Book*, *The ISM Trustee Handbook*, and *The Tuition Book* will be prepared to function in a manner that will improve and solidify your school's viability. Every Board member will benefit from these key "instruction manuals." Ensure that everyone is using the same language and working from the same game plan.

### THIS SERIES INCLUDES:

- » *The Strategic Planning Book*

### INDIVIDUAL BOOK PRICING:

Consortium Gold: \$35 // Nonmember: \$49

- » *The ISM Trustee Handbook*

### INDIVIDUAL BOOK PRICING:

Consortium Gold: \$35 // Nonmember: \$49

- » *The Tuition Book: Theory, Planning, and Financial Aid*

### INDIVIDUAL BOOK PRICING:

Consortium Gold: \$35 // Nonmember: \$49

**Consortium Gold: \$108 // Nonmember: \$135**

To order 10+ copies at a discounted price, contact Rashida Simmons at 302-656-4944 or [bookstore@isminc.com](mailto:bookstore@isminc.com)

Get the **resources** and the **advice** to help your school **thrive.**

## Ideas & Perspectives

You can be sure that you're getting proven management solutions and strategies for the important issues your school faces—because we field-test them in our on-site work with more than 100 schools each year.

Our timely, research-based advisory newsletter is published 16 times a year and is available in a variety of formats, including print, online, and for the iPad.

### I&P covers critical topics such as:

- Performance Characteristics for Advancement Professionals
- Predictability and Supportiveness: The ISM School Culture Matrix
- Teaching as Leadership: ISM Research
- How to Design Your Annual Fund as a Platform for Major Gifts

Your subscription to *Ideas & Perspectives* is a benefit of ISM Consortium membership—both Gold and Silver levels.

**isminc.com/consortium**  
302-656-4944

Visit [isminc.com/ipsample](http://isminc.com/ipsample) to preview our research-based, flagship advisory publication *Ideas & Perspectives* or contact us to subscribe!



### Workshop Registration, Confirmation, and Cancellation

For individual registrations, you can register online with a credit card, download a registration form at [isminc.com/workshops](http://isminc.com/workshops), or call us at 302-656-4944. *Online registration for special offers and deposits is not available—you must call or submit a registration form.*

**Please submit your registration form and payment early.** We fill our workshops on a first-come, first-served basis. *(Sorry, we cannot accept enrollments from consultants or representatives of associations or organizations.)*

**Payment must accompany your registration to reserve your place in the workshop.** Pay online with a credit card, or by mail or phone. If you register before the Early Bird deadline, you may choose payment in full or a \$600 deposit. **You must call 302-656-4944 if you plan to use the deposit option.** Payment is fully refundable until 10 days before the workshop begins. Registering by April 15 will allow you to save from \$182 to \$514 depending on the length of your workshop.

**Tuitions include** all workshop materials, continental breakfasts, most lunches, welcome dinners, social hours, and breaks.

**Accommodations and travel are not included.**

**Tuition is reduced for ISM Consortium Gold members.** To check on membership, call Sara Snowden at 302-656-4944. *(Not all schools that receive Ideas & Perspectives are Consortium Gold members.)*

**If you must cancel, please call ISM at 302-656-4944 and then confirm in writing via email to [workshops@isminc.com](mailto:workshops@isminc.com).** Refund policy for ISM workshops and Academies: Full refund up to 10 business days prior to the start of the workshop; thereafter, service charge of \$600 up to the first day of the workshop; tuition forfeiture on or after the first day of the workshop. **Nonpayment of tuition does not constitute a cancellation.**

If you enroll using **Consortium Credits** and cancel your attendance by calling and in writing at least 10 business days prior to the start date of the workshop, all Credits will be returned to your school. Thereafter, you will get all but 2 Credits returned up to the first day of the workshop; Credit forfeiture on or after the first day of the workshop. Visit our website [isminc.com/workshops/workshop-policy](http://isminc.com/workshops/workshop-policy) for the complete cancellation policy.

### Checking In and Checking Out

**Plan to arrive at the hotel at least two to three hours before the start time on the first day of your workshop.** An hour before your workshop you will be able to pick up your nametag, find your workshop room, and get tech help. Most courses held in Wilmington start at 3:00 the first day and end at noon on the final day.

Please make your departure plans are two to three hours after your workshop is scheduled to conclude to take full advantage of teaching and networking time.

Refer to your workshop page at [isminc.com](http://isminc.com) and click on the “Schedule” tab for detailed information. You also will receive an outline for your workshop as part of the registration process.

### Travel

If you plan to fly, **please do not make nonrefundable airline reservations** unless all of the following conditions are met:

1. You have registered—and paid either the required deposit or in full.
2. You have been sent an acknowledgment that your registration was received.
3. It is noted on the course calendar Web page that the class is **confirmed** to run at the time you sign up, and/or you have been notified via email that the course is confirmed to run.

### Hotel Reservations

**Summer Institute attendees:** Our hotel for Wilmington workshops is the Westin Wilmington, which is adjacent to the Chase Center on the Riverfront. As soon as you register for your workshop, please make your sleeping room reservations. If you register online, click on LOCATION and then the RESERVE YOUR ROOM box to make your hotel reservation or call (302) 654-2900 and mention you are with ISM to get our special group rate of \$159 per night plus tax. This rate is available until May 30, 2016, for our June workshops, and until June 22, 2016, for our July workshops.

Wi-Fi is complimentary for ISM attendees in Wilmington.

**All other workshops and Academies:** Visit the Web page for the event you are attending and click the LOCATION tab for reservations and details.

*Remember, the cost of travel and lodging is not included in your tuition. Note: ISM will not be responsible for any change or cancellation charges assessed by airlines, hotels, or travel agents.*

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