

Overview of Heads Up Presentations

Note: The most popular presentations (as keynotes or workshops) are the following, all of which range from 1½ hours to 3 hours (or longer, up to full-day, 6 hours, depending on format) as the organization requests. Full-day or multiple-day training sessions are indicated below, but also can be customized by combining two or possibly three of the workshops. Workshops where travel and on-site presence are required of the Heads Up consultant are billed the full \$3500 1-day consulting fee, plus travel expenses, whether the keynote/workshop is 1-hour or 6-hours or anything in between. Workshops that are delivered virtually via teleconferencing are billed at the hourly consulting fee rate of \$350 per hour. Faculty and the school leadership team (management/admin staff) presentations or in-service events can be ½-day or full-day events of 1-day or 1 ½-day retreats, depending on format and needs. (1½ day retreats are billed at \$4500, plus travel.) Interested parties can preview the PPT presentations located on the Heads Up website: www.headsuped.com/resources. To customize the workshop as desired for any and all of the presentations, Heads Up recommends before the session a conference call with the organization's leadership (for schools, the head of school and in the case of board workshops, with the board chair and any other members of the planning group, such as the Governance Committee chair; for associations, the executive director and director of professional development).

Any of the following offerings can be formatted as a keynote or a workshop.

Keynotes/Workshops

- **Governance 101/201/301:** This presentation entails an overview of roles and boundaries; best practices for board and members; role plays and video case studies to define the "jobs" of the major constituencies (board; parents; alumni; faculty/staff; and head/admin team); a focus on three levels of governance of high functioning boards (fiduciary, strategic, and generative); application of these three levels as the lenses of oversight, foresight, and insight to the challenges and opportunities facing the school and by this means modeling in the workshop how boards should think and work.

Audience: Boards and Admin Teams. Presenter: Pat Bassett – Heads Up President, or other Senior Associate Heads Up Consultant selected by the school

- **Governance-Level Three: Generative Thinking:** In this workshop, the Heads Up facilitator will present a brief overview the three levels of work of high-performing boards, fiduciary, strategic, and generative, and then focus on how a board as a whole and board members individually can think generatively and address large challenges and opportunities generatively. The discipline of considering agenda items through all three lenses will be modeled by addressing universal issues such as rising health care and other benefit costs; adding more foreign languages to the curriculum; addressing the absence of a leadership development pathway for teachers; etc. The school leadership in a planning session prior to the workshop will decide on one or two larger topics to address and to practice the skill set: the direction of schools of the future; the pandemic of cheating in schools and in the culture at large; the drivers of motivation in the workforce; the tensions of the shift in the workforce with the entrance and soon to be dominance of the Millennial Generation; etc. Once decided, homework (readings and YouTube clips) will be assigned prior to the workshop.

Audience: Boards and Admin Teams. Presenter: Pat Bassett – Heads Up President, or other Senior Associate Heads Up Consultant selected by the school

• **Trends Impacting the Independent School Sector:** This presentation is based on the research NAIS assembles in its annual *NAIS Trendbook* (available for sale for trustees and school leaders at the end of August, typically, every year). The presentation extracts from each the last three years' *Trendbooks* the common trends around several topics boards and school leaders should pay attention to: shifts in the economy related to purchasing power; shifts in school-age and teacher demographics; the landscape of access and affordability related to financial aid trends; student safety, health, and school climate; the philanthropy outlook; changes in the American family; and the diversity outlook.

Audience: Boards and Admin Teams. Presenter: Pat Bassett – Heads Up President, or other Senior Associate Heads Up Consultant selected by the school

• **Downsizing To Grow:** This presentation confronts the reality of the vulnerability many schools face in terms of financial sustainability related to weakening demand, shifting school-age demographics, rising costs, and proliferation of programming and staff. It demonstrates “right-sizing” strategies that can not only improve business result but also build staff strength and program quality. The presentation offers case studies of schools that have successfully “downsized to grow.”

Audience: Boards and Admin Teams. Presenter: Rich Odell – Heads Up CEO, or other Senior Associate Heads Up Consultant selected by the school

• **Schools of the Future: The Big Shifts.** This presentation addresses how education in the 21st C. is changing dramatically, influenced by the rapid adoption of technologies that now facilitate teaching and learning and access to information and knowledge. The central strategic and generative question addressed is, "Where is the school now positioned on the continuum of classical/traditional vs. progressive/innovative education, and where does it want to be?"

Audience: Boards, Admin Teams, Faculty & Staff, Parents, the General Public, the Media. Presenter: Pat Bassett – Heads Up CEO, or other Senior Associate Heads Up Consultant selected by the school

• **The Moral Life of Schools: Teaching Ethical Thinking & Moral Courage:** This presentation examines the various systems of ethical decision-making that schools should be including in the “life skills” element of their programming as well as embedding in the “teachable moments” that naturally arise in all class subject area discussions, the daily world news, and events that happen in the life of the school. It offers a rubric from the Institute of Global Ethics as well as practical “crisis-mode” decision-making frames of reference.

Audience: Boards, Admin Teams, Faculty & Staff, the General Public. Presenter: Pat Bassett – Heads Up President, or other Senior Associate Heads Up Consultant selected by the school

• **25 Factors Great Schools Have in Common:** This presentation (or this presentation combined with *25 Factors Great Boarding School Have in Common*) addresses the common threads of the whole cloth that makes up high-performing independent schools. The presentation asks school to survey in advance the board and admin team to see what the “wisdom of the crowd” shows to be those factors which are most important to the school’s well-being and effectiveness that the school already does well (and should leverage and promote) vs. those factors which are most important to the school’s well-being and effectiveness that the school does *not* do well (and should address to ameliorate).

Audience: Boards, Admin Teams, Faculty & Staff, Parents. Presenter: Pat Bassett – Heads Up President, or other Senior Associate Heads Up Consultant selected by the school

• **25 Factors Great Teachers Have in Common:** This presentation articulates the skills sets and attitudes great teachers exhibit, what motivates them, and their impact on students. A “wisdom of the crowd” group process on site or survey prior to the event identifies the top 5 – 6 factors that the group identifies as most important and they believe their teachers do well, and the top 5 – 6 factors that the group identifies as most important and they believe their teachers need to improve.

Audience: Boards and Admin Teams, Faculty & Staff. Presenter: Presenter: Pat Bassett – Heads Up President, or other senior Heads Up associates)

• **Difficult Conversations:** This workshop opens on a short presentation the elements of difficult conversations, how they spiral into threats to image, and how to redirect them into productive channels. At this point we ask for volunteers to role play the various difficult conversations we have in schools: board chair and head at odds over a policy or administrative decision; board chair and disruptive trustee; supervisor giving a critical performance review to subordinate; indignant parent berating a teacher in the doorway of her classroom; etc. Participants are invited to submit examples of difficult conversations they have experienced or seen, that the presenter will convert into anonymous role plays. Through observation and practice, we develop the skill of managing difficult conversations into productive ones.

Audience: Boards, Heads, Admin Teams, and/or Faculty. Presenter: Pat Bassett – Heads Up President, or other Senior Associate Heads Up Consultant selected by the school

• **Leadership, Change, & School Culture:** Keynote and/or In-service Day. This presentation can be a stand-alone event of a full in-service workshop day. If the latter, the day is divided into three parts: i.) A framing keynote address; ii.) small group discussions; iii.) reporting out themes, observations, and insights from the small groups to the whole group in plenary session. The Keynote addresses the intersection between leadership style and organizational culture as that nexus relates to the success of leaders and the enterprises they lead, up and down the school's structure. Since virtually all teachers and staff have their own leadership style and a preference for how they like to be led, the keynote opens with a framework around three archetypal leadership styles and how each impact various cultures. Then the address shares the results of the school's current culture and its aspirational culture, as evidenced in results from the OCAI Survey (Organizational Culture Assessment Inventory) administered prior to the workshop day. The keynote also addresses key concepts around change agency, resistance to change, the distinction between management and leadership, managing difficult conversations, leading from the middle, and minimizing the disruptiveness of disruptive innovation. For the full-day in-Service version of the workshop, administration of the OCAI is required: OCAI is an expensive purchase (\$3500), but one that has been carefully researched and validated, used by 10,000+ organizations, including all the schools that Heads Up Ed & Triangle Associates have undertaken, as well as by schools that have chosen this workshop as an all-day faculty/staff in-service.

Audience: Boards, Heads, Admin Teams, and/or Faculty. Presenter: Pat Bassett – Heads Up President, or other Senior Associate Heads Up Consultant selected by the school

• **The Independent School Advantage:** This presentation, typically for parents and prospective parents and the general public, examines the “independence” advantages of independent schools; demonstrates with data the value-added college-preparatory outcomes for our graduates; and articulates the essential elements of the independent school partnership with parents.

Audience: Boards, Heads, Admin Teams, Parents, The General Public, the Media, and/or Faculty. Pat Bassett – Heads Up President, or other Senior Associate Heads Up Consultant selected by the school

Admin Team Executive Coaching/Retreats

• **Principled Decision for School Leaders & Teams:** This ½-day workshop addresses various leadership conundrums and assessments, including the Google and Patrick Lencioni distinctions between high functioning and lower functioning or dysfunctional teams; the Myers-Briggs profile for each team member and the collective team profile in relationship to decision-making; change agency and overcoming resistance to change; strategies and role-plays around managing difficult situations; the distinction between management and leadership; “leading from the middle”; rubrics and case-studies for decision-making under fire; and similar topics.

Audience: Heads and their Admin Leadership Teams. Presenter: Pat Bassett – Heads Up President, or other Senior Associate Heads Up Consultant selected by the school

• **Leadership Style, School Culture, and the Value Proposition:** This ½-day workshop (often combined with the workshop above for a full 1-day retreat) addresses two primary leadership elements: the intersection of leadership style and school culture; the “landscape challenges” that the leadership team faces in securing the future of the school, including brainstorming around the school’s value proposition. The workshop unfolds over two 3-hour sessions, for which there are readings and exercises assigned. For Part I the consultant presents on two topics central to the success of the school and its leaders: 1.) The Intersection of School Culture & Leadership Style; 2.) The Elements of Value Pyramid. For Part II, the consultant presents on two strategic topics (decided in advance with the school head) and leads discussions on their implications for the team and the school, inviting open discussions on the real-world conundrums faced by the school’s administrative leaders, guiding the team by practicing and role-modeling on these conundrums for problem-solving pragmatically, strategically, and generatively.

Audience: Heads and their Admin Leadership Teams. Presenter: Pat Bassett – Heads Up President, or other Senior Associate Heads Up Consultant selected by the school

• **Experiential Leadership Training Offerings:** Additional highly customized, experiential and feedback components for each school and its admin team would span 1½ days to 2 days or 2½ days, combining the elements of the above two executive coaching workshops but adding individual team members 360 evaluations (deconstructing one’s own and the team’s evaluation/360s of the leadership team as individuals and the team as a team-utilizing the School Leadership Inventory) and/or experiential leadership training (e.g., walking the battlefield and de-constructing leadership conditions and decisions at Gettysburg; examining the dynamics that created the U.S. Constitution at Montpelier, Madison’s historic home in VA; or an outing in one’s locale that offers physical and/or intellectual team challenges).

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