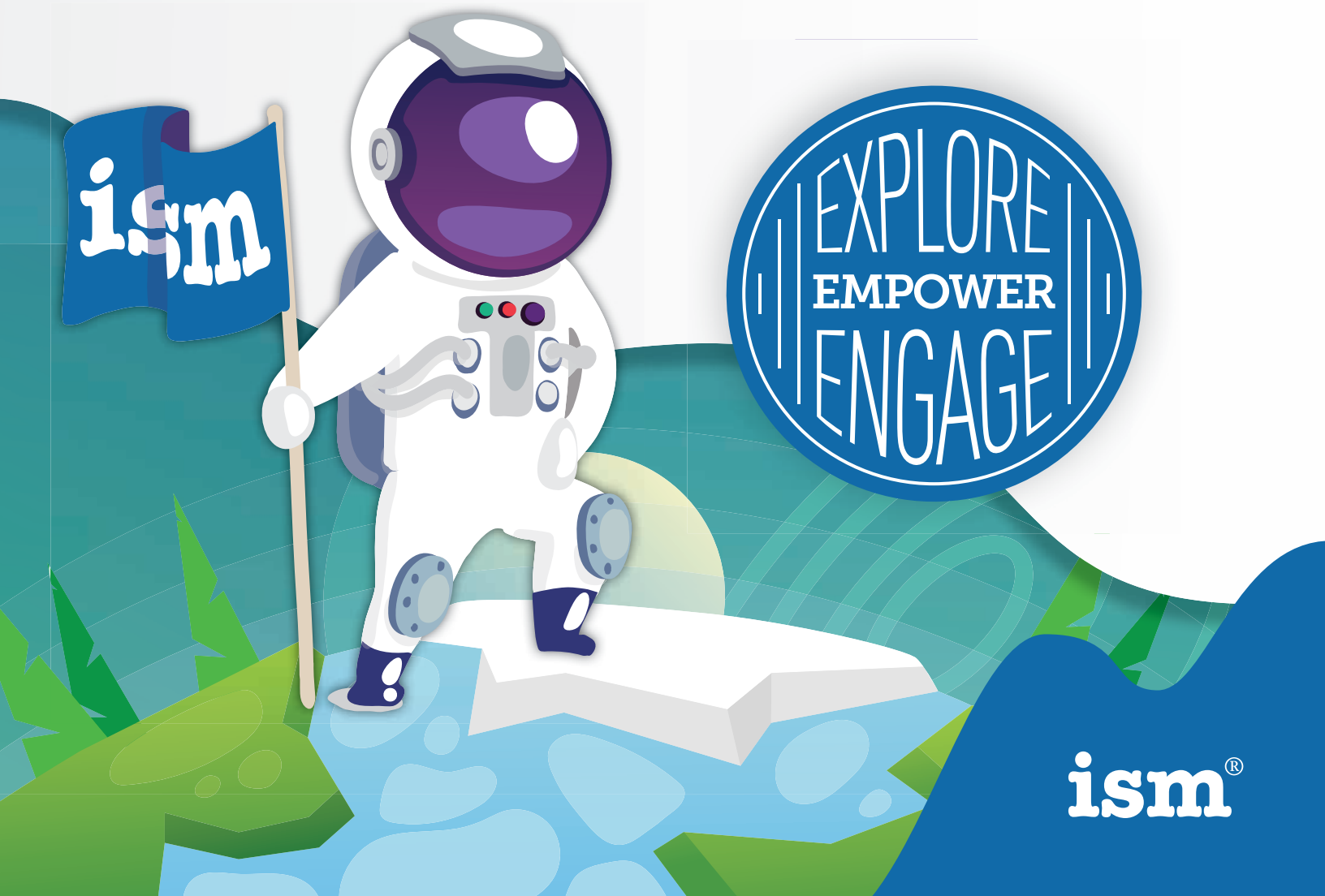


2022 learning events

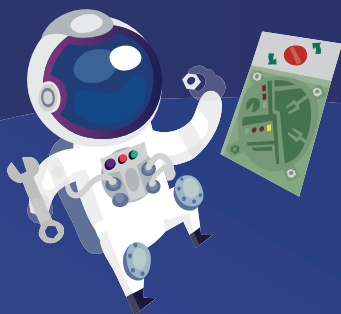
SCHOOL-YEAR WORKSHOPS | SUMMER INSTITUTE | ADVANCEMENT ACADEMY



ism[®]

Explore. Empower. Engage.

Our mission? To help you deliver yours with excellence. Choose from 50+ professional development events in 2022 to help you reach your goals through data-driven guidance, research-based strategies, and 45+ years of experience.



Explore

a specific topic through hands-on, in-depth learning

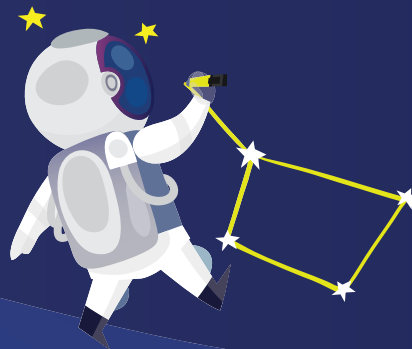
Forget high-level overviews—it's time for action. Gain expertise about a specific aspect of private school leadership or learn the nuts and bolts of your position. Leave feeling empowered, engaged, and ready for new challenges!



Empower

your team to reach its goals with a customized action plan

Achieve your goals faster and with confidence through a tailored, one-of-a-kind ISM road map for mission success. Create your plan and implement positive changes immediately. No guesswork here.



Engage

with a trusted school leader for guidance

Our workshops are led by ISM Consultants—experts, each with extensive experience leading in private schools—or our adjunct faculty—many of whom work in schools today. Get personalized support from the team you know and trust.

MARCH

March 1–2: ■ How to Implement Transformative Faculty Growth & Evaluation

March 7–9: ■ Strategic Financial Planning: A Comprehensive Approach

March 17–18: ■ How to Move Past AP and Build a Mission- and Values-Based Curriculum

March 21–25: ■ Student-Centered Scheduling Design

March 31–May 12: ■ Road Map to Year One: ISM's New Head Accelerator

APRIL

April 4–8: ■ The Keys to Building an Effective Mentoring Program

April 19–20: ■ How to Build and Implement an Extraordinary Major Gifts Program

April 19–20: ■ How to Implement Transformative Faculty Growth & Evaluation

April 28–29: ■ How to Move Past AP and Build a Mission- and Values-Based Curriculum

MAY

May 11–12: ■ Transforming Student Assessment: Determining Authentic Evidence of Learning

REGISTER TODAY!


➦ go.isminc.com/workshops

🗨 302-656-4944

JUNE


WEEK OF MONDAY, JUNE 13

13


June 15–16:  How to Implement Transformative Faculty Growth & Evaluation


WEEK OF MONDAY, JUNE 20

20

June 21–22:  How to Successfully Transition From Teacher to Administrator

June 21–22:  Master the NCAA Recruiting Process

June 21–22:  For Administrators: How to Ensure Teachers New to Independent Schools Succeed

June 21–22:  Transforming Student Assessment: Determining Authentic Evidence of Learning

June 21–22:  How to Transform Your Existing Website Into an Inquiry Machine

June 21–23:  Strategic Financial Planning: A Comprehensive Approach

June 21–23:  The New Admission Director

June 21–24:  Build a Strong Advisory Program

June 22–24:  Build and Grow a Robust Annual Fund

June 23–24:  How to Build a Successful Growth Coaching Program

WEEK OF MONDAY, JUNE 27

27

June 27–29:  Scheduling the Elementary School Program

June 27–29:  How to Build a Successful Growth Coaching Program

June 27–30:  High-Performing Teams: Managing Up, Down, and Sideways

June 27–30:  Capital Campaign Mastery: Design and Implement an Extraordinary Campaign

June 27–30:  The New Admission Director

June 27–30:  The New Marketing Communications Director

June 27–30:  Mastering Your Role as Middle School Dean of Students

June 27–30:  The Vital Role of the Executive or Administrative Assistant

June 27–July 1:  Student-Centered Scheduling

June 27–July 1:  The New School Business Officer


JULY

WEEK OF MONDAY, JULY 11

11

July 11–14:  Directing the Athletic and PE Programs

July 11–15:  Transformative Academic Leadership

July 11–15:  Balance Your Roles as Upper School Dean of Students

July 11–15:  Chairing Your Department: The First Five Years

July 11–15:  Leading the Effective Lower School

July 11–15:  Leading the Effective Middle School

July 11–15:  Leading the Effective Upper School

July 11–15:  The New Development Director


WEEK OF MONDAY, JULY 18

18

July 18–22:  Advancement Academy

WEEK OF MONDAY, JULY 25

25

July 25–26:  For Teachers: How to Succeed When You're New to Independent Schools

July 25–27:  Dollars and Sense for the New School Head

July 25–28:  High-Performing Teams: Managing Up, Down, and Sideways

July 25–29:  Chairing Your Department: The First Five Years

AUGUST

WEEK OF MONDAY, AUGUST 1

1

August 1–3:  Mastering Enrollment Management

SEPTEMBER-OCTOBER

BE ON THE LOOK OUT FOR OUR FALL LINE-UP!

NOVEMBER

November 2–5

 Annual Heads Retreat



summer institute

JUNE 21–AUGUST 3, 2022

★ 35+ WORKSHOPS

★ HANDS-ON LEARNING

★ ACTION PLANNING

★ NETWORKING

★ ONLINE AND IN-PERSON
OPTIONS

★ FOR ALL POSITIONS

Starts on
PAGE
11

advancement academy

JULY 18–22, 2022

★ 36+ SESSIONS
TO CHOOSE FROM

★ MENTORSHIP

★ ACTION PLANNING

★ NETWORKING

★ FOR:
ADMISSION/ENROLLMENT
DEVELOPMENT
MARKETING
COMMUNICATIONS

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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, ISM will credit the tuition you paid toward another similarly priced workshop or refund your tuition up to 100%.



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CREDITS AND CERTIFICATION



Business Certification Program (BCP) Credits

Independent School Management, in conjunction with practicing professionals in the field, has developed a certification process specifically for Business Officers in private-independent schools. This process ensures common standards and inspires and supports professional development throughout the industry. It gives Business Officers a way to demonstrate levels of achievement.



International Advancement Certification Program (IACP) Credits

Independent School Management 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).



ISM's Membership

Take your school from excellent to extraordinary

For the last 45+ years, over 8,000 private-independent school leaders have **delivered their missions with excellence** with ISM's support and guidance. Discover how **research-backed strategies and time-tested tools** will help your school thrive. Reach your goals—find out how with ISM's member benefits.

Learn more at isminc.com/membership

MEMBERSHIP LEVELS



MOST POPULAR

Silver

DATA-DRIVEN RESEARCH & EXPERT ADVICE

Rely on *Ideas & Perspectives*—our research-based, advisory letter—and unlimited ISM webinars to help guide your leadership decisions

Most accessible—ideal for schools of all sizes and budgets.

SILVER MEMBER BENEFITS:

- ✓ *Ideas & Perspectives*
- ✓ Complimentary ISM Webinars

Gold

SAVINGS & EXCLUSIVE CONSULTANT ADVICE

Supercharge your school's strategies with savings on professional development and access to exclusive, Consultant-led forums—plus all Silver member benefits.

Additional opportunities to work with ISM Consultants.

GOLD MEMBER BENEFITS:

- ✓ All Silver Member Benefits Plus:
- ✓ Consultant-Facilitated Forums
- ✓ Savings on Workshops and Consulting
- ✓ Complimentary Subscription to International Circle

Platinum

VIP SERVICE FOR SCHOOL TRAILBLAZERS

Aspire to the highest tier of excellence with dedicated support for the School Head along with world-class resources for your entire school team.

Superior tools and an exclusive cohort of private School Heads.

PLATINUM MEMBER BENEFITS:

- ✓ All Gold Benefits Plus:
- ✓ One-on-One Mentoring
- ✓ Peer Advisory Board
- ✓ Stability Marker Survey
- ✓ Parent Satisfaction Survey



“

[ISM's research] is a gold mine to me. I feel so much more equipped ... and excited to implement key business tools and measurements to further our growth. The material is truly invaluable.”

Holly Webster, *Director of Finance*,
Seattle Classical Christian School, WA
Gold Member School

As a founding Head, I have relied on ISM for resources and guidance. We succeeded because ISM gave us a path to follow.”

Michele Joseph, *Head of School*
Gateway Academy, TX
Gold Member school

ISM clearly has a passion for research, the results, and employing the information in a way to support the long-range success of its members and participating schools.”

Meredith King,
Director of Finance and Operations
Walden School, CA
Gold Member School

FEATURED BENEFIT

Members Watch ISM Webinars for Free

ISM members benefit from 35+ live webinars each year in addition to 175+ webinars in the on-demand library. Our webinars are Consultant-led, timely, and action-oriented. Enjoy advice and guidance right from your office, without missing a beat on campus.

View our webinar lineup
at **isminc.com/webinars**

POPULAR WEBINAR TOPICS INCLUDE:



Before You Make the 2022–2023 Tuition Decision



Strategies for Securing a “Yes” From Your Accepted and Reenrolling Families



Safe to Brave: Courageous Conversations



How to Use Content Marketing to Attract Mission-Appropriate Families



How to Ask the Right Questions as a Growth Coach

“

I appreciated that this webinar had steps to follow and was very practical. This was very helpful.”

Victoria Livingston, *Early Childhood Coordinator*
Chiaravalle Montessori, IL

Is Now the Right Time to Change Your Schedule in Light of COVID? webinar attendee

Brilliant—we’ll be implementing immediately!”

Andy Shoff, *Head of School*
Telluride Mountain School, CO

How to Hire Ideal School Employees and Avoid Costly Mistakes webinar attendee



Ways to Save



Save up to 10% with Early Bird

Sign up early for the biggest savings! Register by Friday, April 15, 2022, to take advantage of Early Bird pricing on Summer Institute and Advancement Academy.

Save up to 39% with Team Pricing on select workshops

When school leaders attend together, they become partners in the learning experience. Join us with your team to create a school-specific action plan that you use immediately once you return to school.

You can save up to 39% on additional team member's tuition for select workshops and events. See each workshop description for 2nd person+ pricing or email schoolsuccess@isminc.com.



Save up to 30% with Gold or Platinum Membership

Unlock member savings on workshops! Gold members save **20%** on workshop tuition—Platinum members save **30%**!

In addition to these savings, you also have access to the most forward-thinking advisory letter for private-independent school leaders—*Ideas & Perspectives*—plus much more!



See all member benefits and get started at go.isminc.com/sign-up.

school-year workshops

ONLINE EVENTS

Spring 2022



How to Implement Transformative Faculty Growth & Evaluation

 March 1–2 or April 19–20 or June 15–16

Led by: **Barbara Beachley** • 11th year leading
Consultant & Executive Director
of Organizational Learning and Development, ISM

Cultivate an understanding of the relationships between leadership, leader well-being, faculty culture, and student performance.

Explore a mission-driven and comprehensive approach to hiring and induction, assessing and enhancing faculty and school culture, faculty growth and evaluation, corrective action, selective retention, and coaching and mentoring.

This workshop is for:


Academic administrators including School Heads, Division Heads, Academic Deans, Deans of Faculty, Department Chairs, and others who work closely with faculty

Tuition Information:

Platinum Member: \$945


Gold Member: \$1,080

General: \$1,350

 **Bring your team!** Pay only \$810 tuition for each additional team member.



Strategic Financial Planning: A Comprehensive Approach

 March 7–9, 2022

30 IACP & BCP CREDITS isminc.com/iacp & isminc.com/bcp

Led by: **Terry L. Moore, BCP-E** • 19th year leading
Executive Consultant, ISM

Strategic planning helps reset a school's direction and brings about meaningful institutional growth. Understand the important elements that are required to create an effective strategic plan.

Discuss effective Board structure, explore your school's marketplace stance, and learn how to quantify your school's perceived value. Discover the steps you must take now to protect your school for the future.

This workshop is for:


Board Presidents, Chairs of Finance Committees and other key Board-committee leaders, School Heads, COOs, CFOs, Business Managers, and other senior administrators

Tuition Information:

Platinum Member: \$1,183

Gold Member: \$1,352

General: \$1,690

 **Bring your team!** Pay only \$1,014 tuition for each additional team member.



How to Move Past AP and Build a Mission- and Values-Based Curriculum

 March 17–18 or April 28–29

Led by: **Mike Gwaltney** • 8th year leading
Consultant & Director of Online Learning, ISM

If your school continues to offer standardized courses based on external content goals, you're missing out on a student-centered approach.

Explore why your school must evaluate your existing curriculum and how to redesign it to better benefit your students.

See how schools have achieved success in moving from Advanced Placement toward coursework that is more meaningful, authentic, and relevant to students.

This workshop is for:


Academic administrators, Division Heads, Deans, Department Chairs, and teaching faculty

Tuition Information:

Platinum Member: \$945

Gold Member: \$1,080

General: \$1,350

 **Bring your team!** Pay only \$810 tuition for each additional team member



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, ISM will credit the tuition you paid toward another similarly priced workshop or refund your tuition up to 100%.

Student-Centered Scheduling Design

 March 21–25

Led by: **Bryan Smyth, Ph.D.** • 8th year leading
Senior Consultant & Director of Research, ISM

Examine the latest research in scheduling and classroom instruction to guarantee a strong, healthy schedule that enhances the quality of your graduates.

Creating your 2022–23 schedule doesn't have to be a caffeine-fueled, angst-driven exercise in futility. This workshop takes you back to basics and refocuses your scheduling strategy on what's best for your students, rather than what may be most convenient for adults.

This workshop is for:


Middle and Upper Division Heads/Principals, School Heads, and other administrators and faculty leaders involved in scheduling school classes

Tuition Information:

Platinum Member: \$1,638


Gold Member: \$1,872

General: \$2,340

 **Bring your team!** Pay only 1,404 tuition for each additional team member.



Road Map to Year One: ISM's New Head Accelerator

 March 31–May 12

Led by: **Shannan Schuster, Ed.D.** • 2nd year leading
Consultant, ISM

You're starting a new Headship this year or began one during the most unprecedented school year in education. Now what?

ISM Consultant Shannan Schuster, who recently finished a headship at The Swain School, Pennsylvania, will share her experiences, along with ISM tools and strategies to ensure your first year is productive and successful.

This online workshop will set you on the right course—without dedicating endless hours of meetings or coursework to professional development. Discover the invaluable framework that provides a roadmap to succeeding as a new Head.

This workshop is for:

Heads preparing to start their role in summer 2022 or who have just completed their first year in the position

Tuition Information:

Platinum Member: \$1,960

Gold Member: \$2,240

General: \$2,800



The Keys to Building an Effective Mentoring Program

 April 4–8

Led by: **Andrew Taylor, Ed.D.** • 5th year leading
Consultant, ISM

If your school is experiencing a teacher shortage, you're not alone. Almost all 50 states reported teacher shortages in the 2020–21 school year, according to the U.S. Department of Education.

What's a powerful difference-maker in supporting and retaining teachers? Effective mentoring programs.

Consider this a call to action: Join us as we examine the critical elements needed to develop a mission-driven mentoring program. Create a concrete action plan to keep your school one step ahead of the competition.

This workshop is for:


All those involved in leading and supporting faculty

Tuition Information:

Platinum Member: \$1,183

Gold Member: \$1,352

General: \$1,690

 **Bring your team!** Pay only \$1,014 tuition for each additional team member.



How to Build and Implement an Extraordinary Major Gifts Program

 April 19–20, 2022 | 20 IACP CREDITS isminc.com/iacp

Led by: **Herbert P. Soles, CFRE, IAP-L** • 16th year leading Consultant, ISM

Schools are driven by the ever-increasing demand for more funding, yet are also aware of return on investment. Therefore, many development leaders focus their fundraising efforts on major gifts.

If your major gift plans stalled last year, now is the time to revisit them. Discover how to use foundational approaches to build and solidify relationships with your biggest donors. Explore a proven methodology for creating a fundraising program that, when tailored to your school's unique needs, is proven to produce results.

This workshop is for:


School Heads, Development Directors, Major Gift Officers, Board Chairs, and Development Committee members, along with other interested Trustees

Tuition Information:

Platinum Member: \$945

Gold Member: \$1,080

General: \$1,350

 **Bring your team!** Pay only \$810 tuition for each additional team member.



Transforming Student Assessment: Determining Authentic Evidence of Learning

 May 11–12

Led by: **Mike Gwaltney**, Consultant & Director of Online Learning, ISM
8th year leading

Are your students involved in meaningful, hands-on work that keeps them actively engaged? Do they produce work and perform tasks that they believe are meaningful?

Too many schools and teachers simply fall back on traditional assessments and grading formulas. Most often, these are not true markers of student understanding.

It's time to think about your school's approach to assessment—that is, how you measure evidence of learning and achievement. Explore how to assess learning that illustrates true comprehension and make changes moving forward.

This workshop is for:


School Heads, Division Heads, faculty and Academic Deans, Department Chairs, and other academic leaders as well as teachers

Tuition Information:

Platinum Member: \$945

Gold Member: \$1,080

General: \$1,350

 **Bring your team!** Pay only \$810 tuition for each additional team member.

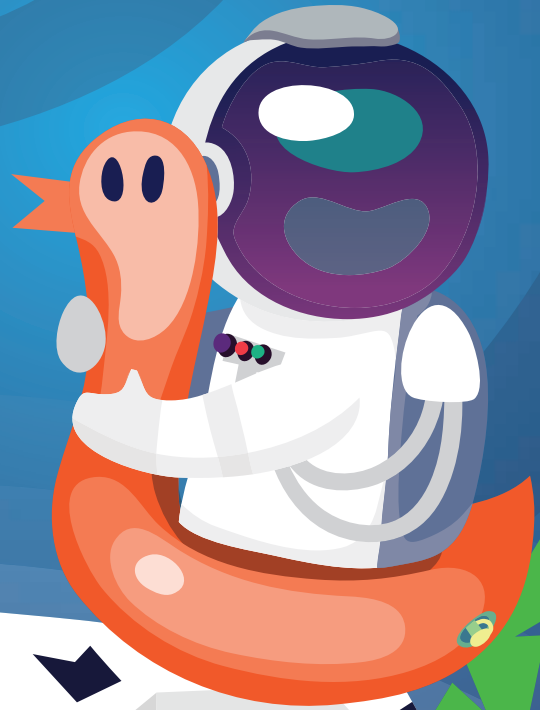


We guarantee your satisfaction. ISM believes in providing quality and excellence in our workshops, and in ensuring the satisfaction of everyone who attends. If you are not satisfied with your workshop, ISM will credit the tuition you paid toward another similarly priced workshop or refund your tuition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

summer institute

ONLINE & IN-PERSON WORKSHOPS

June 21–August 3, 2022



summer institute

JUNE THROUGH AUGUST, 2022 | PHILADELPHIA, PA & ONLINE

99%

of Summer Institute survey respondents felt their workshop met or exceeded expectations.

97%

would recommend Summer Institute to a colleague or friend.

99%

of survey respondents felt their workshop was worth the price!

Stellar Learning for Exceptional School Leaders

With a record-breaking **250+ new member schools** and **700+ attendees** at last year's Summer Institute, school leaders from all over the world are benefiting from ISM's research and guidance.

Isn't it time you joined us?



ISM continues to be the **gold standard** in independent school consulting. ISM is research-based, data-driven, and super focused on the metrics."

Matt Allio, *Head of School*
Trinity School, CA

The workshop leaders are experts who were not only **knowledgeable and engaging** but a **delight to learn from.**"

Nikea Johnson, *Director of Development*
Westside Neighborhood School, CA

Thank you! This is one of the **best professional development workshops** I've attended."

JP Arrastia, *English Teacher*
Ransom Everglades School, FL

This workshop delivered what it promised and more. I will **wholeheartedly recommend** ISM membership [for savings on workshops] to my Board of Directors."

Sara Acevedo, *Interim Head of School*
Southwestern Educational Society, PR

This workshop was great, thank you. I got a lot of **practical ideas** and feel more prepared to **grow our program.**"

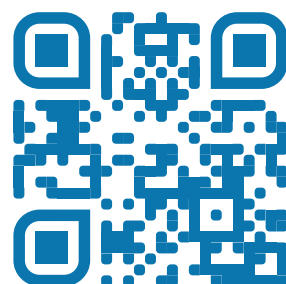
Emily Bonis, *Dean of Faculty*
Hebron Academy, ME



Sign up early for the biggest savings. **Save up to \$520 per seat** with Early Bird Pricing! **ENDS 4.15.22**

Experience your own transformational results.
REGISTER TODAY!

go.isminc.com/si 302-656-4944
 schoolsuccess@isminc.com





CHOOSE YOUR OWN ADVENTURE:

Online or In-Person?

Welcome back to in-person learning! After two years of virtual learning, you can choose the Summer Institute workshop that's best for you—in-person and online learning options are both available.

If you are new to your role, you will benefit most from in-person learning where you can build a network to lean on throughout your career. Workshops that are interaction-intensive will take place in Philadelphia.

Advanced, topic-driven courses are offered online to maximize your time and efficiency, while still ensuring you can excel in your career. Decide which type of learning is right for you!



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, ISM will credit the tuition you paid toward another similarly priced workshop or refund your tuition up to 100%.

	IN-PERSON	ONLINE
I am looking for research-backed strategies to guide my school decisions.	♥	♥
I want to learn from ISM Consultants and adjunct teaching faculty , all of whom are private education experts .	♥	♥
I want to create a custom action plan that I can immediately put into practice.	♥	♥
I want a multi-day, fully immersive experience , where I focus on nothing else but the learning at hand.	♥	
I want extra time with leaders to gain knowledge and expertise, maximizing my learning experience.	♥	
I want ample time to network and work through specific challenges at my school with my workshop leader, other ISM Consultants, and peers.	♥	
I want the opportunity to explore Philadelphia , including visiting the Liberty Bell, the National Constitution Center, and more.	♥	
I want to cover the “ nuts and bolts ” of a specific topic while being efficient with my time.		♥
I want to learn from my home or office for a few hours each day, while tending to my other responsibilities.		♥
I want to get the most out of the professional development budget at my new or small independent school .		♥

For Administrators: How to Ensure Teachers New to Independent Schools Succeed

 June 21–22

Led by: **Josh Nelson, Ph.D.** • 1st year leading
Consultant & Director of Faculty and Curriculum, ISM

Faculty leaders and administrators, this workshop is for you! Discover how to help teachers new to independent schools easily and successfully transition to their new role.

Independent schools are unique and complex. Ensure you can give new teachers the tools to be successful from day one. Explore how to share the culture of independent schools and the expectations of communication. Empower your teachers to deliver your mission with excellence.

Through discussions and hands-on work, attendees learn independent school best practices, how to adapt a framework for predictability and support, and what new hires should avoid.

You'll learn how to:


- demonstrate different aspects of independent schools—and the role teachers are expected to play within each;
- provide new teachers with strategies for navigating independent school culture, including expectations from parents, students, and fellow employees;
- help teachers hone the skills required to communicate in-person and online, and how to approach different constituent groups;
- support teachers in setting boundaries with families, students, and colleagues; and
- share best practices for success.

This workshop is for:

Administrators who want to learn strategies to help teachers new to independent schools succeed

Tuition Information:

Platinum Member: \$1,015 // **\$913.50 Early Bird**
Gold Member: \$1,160 // **\$1,044 Early Bird**
General: \$1,450 // **\$1,305 Early Bird**

 **Bring your team!** Pay only \$870 tuition for each additional team member.



“Really loved this workshop! We received a lot of great information and techniques. It gave me lots to think about. I also loved the access to resources. Keep up the great work.”

Kelly Tomon, *Science Department Chair*
Connelly School of the Holy Child, MD

Transforming Student Assessment: Determining Authentic Evidence of Learning

 June 21–22

Led by: **Mike Gwaltney** • 8th year leading
Consultant & Director of Online Learning, ISM

Are your students involved in meaningful, hands-on work that keeps them actively engaged? Do they produce work and perform tasks that they believe are meaningful?

Too many schools and teachers simply fall back on traditional assessments and grading formulas. Most often, these are not true markers of student understanding.

It's time to think about your school's approach to assessment—that is, how you measure evidence of learning and achievement. Explore how to assess learning that illustrates true comprehension and make changes moving forward.

You'll learn how to:


- align assessment and teaching with your school's most profound and meaningful educational goals;
- communicate to teachers and parents that measuring students' higher-order thinking, personal development, and engagement is as qualifying as their mastery of basic skills and content;
- encourage a school-wide focus on student curiosity and engagement with deep learning; and
- collect and report evidence of critical thinking, creativity, curiosity, citizenship, and other skills and behaviors that matter.

This workshop is for:

School Heads, Division Heads, faculty, Academic Deans, Department Chairs, other academic leaders, teachers

Tuition Information:

Platinum Member: \$1,015 // **\$913.50 Early Bird**
Gold Member: \$1,160 // **\$1,044 Early Bird**
General: \$1,450 // **\$1,305 Early Bird**

 **Bring your team!** Pay only \$870 tuition for each additional team member.



“Mike is a master facilitator. I really appreciated his style, the content, and the process. It greatly benefited me as I head into this new school year! This workshop far exceeded any expectations.”

Annette Aguilar, *Language Arts Teacher*
American School of Guatemala, Guatemala



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, ISM will credit the tuition you paid toward another similarly priced workshop or refund your tuition up to 100%.



Strategic Financial Planning: A Comprehensive Approach

 June 21–23

30 IACP & BCP CREDITS isminc.com/iacp & isminc.com/bcp

Led by: **Terry L. Moore, BCP-E** • 19th year leading
Executive Consultant, ISM

Strategic planning helps reset a school's direction and brings about meaningful institutional growth. Understand the important elements that are required to create an effective strategic plan.

Discuss effective Board structure, explore your school's marketplace stance, and learn how to quantify your school's perceived value. Discover the steps you must take now to protect your school for the future.

You'll learn how to:


- use ISM's 13-line financial planning model to support your school's strategic plan;
- identify your critical, high-impact, strategic numbers, and translate those into an understandable, user-friendly communications tool for your Board and Leadership Team; and
- calculate your Stability Marker™ score—items that strongly correlate to a school's ability to sustain excellence over time—using our proven criteria.

This workshop is for:

Board Presidents, Chairs of Finance Committees and other key Board-committee leaders, School Heads, COOs, CFOs, Business Managers, and other senior administrators

Tuition Information:

Platinum Member: \$1,274 // **\$1,146.60 Early Bird**
Gold Member: \$1,456 // **\$1,310.40 Early Bird**
General: \$1,820 // **\$1,638 Early Bird**

 **Bring your team!** Pay only \$1,092 tuition for each additional team member.



“Terry is fantastic. He presents the information with command, confidence, and without apology. He always provides relevant and current examples and scenarios.”

Matt Allio, *Head of School*
Trinity School, CA

The Vital Role of the Executive or Administrative Assistant

 June 27–30

Led by: **Liz Layne** • 1st year leading
Summer Institute Faculty, ISM
Director of the Head of School Office and Board Relations,
The Ethical Culture Fieldston School, NY

The role of the executive or administrative assistant is vital to school operations. In many ways, you are the glue that holds your school together. But this job also comes with its challenges. Become a valuable leader by partnering with ISM for professional development and peer networking.

You'll learn how to:


- lead from your support position to benefit your school and yourself;
- design a self-evaluation system to chart your professional development;
- use hi- and lo-tech time management tools to achieve better results;
- use current technology to strategically navigate your busy day and add value to your role; and
- prepare for the evolution of the administrative support role.

This workshop is for:

Executive assistants of various experience levels, assistants to School Heads and Division Heads, and receptionists with one year of experience in a support staff position. Assistants to Directors in Admission, Advancement, and the Business Office are also invited to attend

Tuition Information:

Platinum Member: \$2,716 // **\$2,444.40 Early Bird**
Gold Member: \$3,104 // **\$2,793 Early Bird**
General: \$3,880 // **\$3,492 Early Bird**

 **Bring your team!** Pay only \$2,328 tuition for each additional team member.



“Outstanding presentation! I found the instructional format to be very easy to follow. Thanks so much for giving me a head start to the new school year!”

Debra Payne, *Executive Assistant*
Montessori Academy of Colorado, CO

KEY:  Online Workshop  In-Person Workshop

ONLINE AND IN-PERSON OPTIONS!

High-Performing Teams: Managing Up, Down, and Sideways

 June 27–30 in Philadelphia, PA or

 July 25–28

Led by: **Matthew Stuart** • 17th year leading
Summer Institute Faculty, ISM
Head of School, The Caedmon School, NY

These past two years demanded steady and decisive vision and management, all the while challenging leaders with unrelenting uncertainty.

Identify the strengths that you bring to your administrative or Leadership Team, and how to create team excellence when managing up, down, and among peers. After this course, you'll reap the results of strong leadership, healthy cultures, clear purpose, and powerful relationships.

You'll learn how to:

- define your purpose and how it impacts your role in building high-performing teams;
- create powerful partnerships with colleagues to better support your students;
- face conflict with the knowledge of how to carry out difficult conversations from a place of calm and clarity;
- use effective communication rhythms and apply them to your everyday work; and
- internalize tools to hold yourself and team members accountable.

This workshop is for:

Division Heads, Principals, Admission Directors, Advancement Directors, Marketing/Communications Directors, CFOs, and School Heads

Tuition Information:


IN-PERSON

(Immersive learning experience with more opportunities to network with like-minded individuals)

Platinum Member: \$2,716 // **\$2,444.40 Early Bird**

Gold Member: \$3,104 // **\$2,793 Early Bird**

General: \$3,880 // **\$3,492 Early Bird**

 **Bring your team!** Pay only \$2,328 tuition for each additional team member.




ONLINE

(Accelerated courses for busy individuals who prefer to learn from their home or office)

Platinum Member: \$1,526 // **\$1,373.40 Early Bird**

Gold Member: \$1,744 // **\$1,569.60 Early Bird**

General: \$2,180 // **\$1,962 Early Bird**

 **Bring your team!** Pay only \$1,308 tuition for each additional team member.



Capital Campaign Mastery: Design and Implement an Extraordinary Campaign

 June 27–30 in Philadelphia, PA

30 IACP CREDITS isminc.com/iacp

Led by: **Herbert P. Soles, CFRE, IAP-L** • 16th year leading
Consultant, ISM

Your school, whether large or small, can run a successful capital campaign—with the correct preparation. Explore the dynamics of independent school fundraising to support your school's ability to make a difference for your students. Become more confident in your own role and understand how to maximize the capacity of your volunteer and donor base.

You'll learn how to:

- prepare before a campaign, focusing on your school's size, history, and culture;
- determine essential planning steps to help your school successfully reach its goals;
- write a dynamic campaign plan;
- inspire, coach, and train volunteers and staff members to be dynamic fundraisers;
- lead personnel to manage time and the financial resources of a campaign;
- ask individuals for large gifts (known as major gifts fundraising) and explore techniques to increase potential gift size; and
- avoid common pitfalls of each stage of the campaign.

This workshop is for:


School Heads, Development Directors, Major Gift Officers, CFOs, Trustees, and Development Committee members

Tuition Information:

Platinum Member: \$2,716 // **\$2,444.40 Early Bird**

Gold Member: \$3,104 // **\$2,793 Early Bird**

General: \$3,880 // **\$3,492 Early Bird**

 **Bring your team!** Pay only \$2,328 tuition for each additional team member.



“Herb was great. He stuck to the mantra of “keep it simple” and I walked away confident that I can be successful helping our school run a capital campaign.”

Chris Ashbrook, *Director of Advancement*
Wichita Collegiate School, KS

“Thank you for the wonderful workshop. I learned an incredible amount, and was so moved. I'll recommend these workshops to many of my colleagues!”

Catherine Barber, *Assistant Head of Middle School & History Teacher*
Newton Country Day School, MA



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, ISM will credit the tuition you paid toward another similarly priced workshop or refund your tuition up to 100%.



Transformative Academic Leadership

 July 11–15 in Philadelphia, PA

Led by: **Barbara Beachley** • 11th year leading
Consultant & Executive Director of Organizational Learning and Development, ISM

Research shows that a healthy, growth-focused faculty culture is the primary predictor of student performance, satisfaction, and enthusiasm. In an era of “hyperchange,” it is more important than ever to foster a stable culture for students while teaching them to embrace necessary changes for the future. This requires inspired leadership that draws others to action.

School leaders must reconcile competing priorities while still effecting higher-order changes to remain viable and sustainable. This workshop combines practical tools, concrete strategies, cutting-edge research, hands-on activities, and in-depth discussions to support you in embracing the personal and professional challenges that come with leading a student-centered school. Leave this workshop excited to transform your school from excellent to exceptional.

You'll learn how to:


- gain a deeper understanding of who you are as a leader, including your personal strengths and challenges;
- discover concrete tools to assess school culture and foster positivity, collegiality, and professional growth among your teachers;
- discuss student-centered approaches, systems, policies, and pedagogy;
- increase your ability to communicate powerfully and effectively with all constituents; and
- create strategies to impact successful change.

This workshop is for:

Academic administrators such as School Heads, Division Heads, Academic Deans, Deans of Faculty, and others who are closely involved with faculty

Tuition Information:

Platinum Member: \$3,640 // **\$3,276 Early Bird**
 Gold Member: \$4,160 // **\$3,744 Early Bird**
 General: \$5,200 // **\$4,680 Early Bird**

 **Bring your team!** Pay only \$3,120 tuition for each additional team member.



“Thank you for creating a place where educators can get together and learn from each other and from the facilitators of the workshops. I am leaving feeling more confident and equipped with ideas that I can implement when I get back to school. It makes the time and money well worth it.”

Nancy Washburn, *Lower School Principal*
New Life Academy, MN

Dollars and Sense for the New School Head

 July 25–27 | 30 BCP CREDITS isminc.com/bcp

Led by: **Terry L. Moore, BCP-E** • 19th year leading
Executive Consultant, ISM

Shannan Schuster, Ed.D. • 2nd year leading
Consultant, ISM

The School Head is ultimately accountable for prudent fiscal management for the school. Whether you're a brand-new Head or one who wants a refresher on financial management, discover how to develop a fiscal success framework to ensure your school's success.

Rely on ISM's tools and strategies to help you feel more confident in conversations and support the long-term financial viability of your school.

You'll learn how to:


- develop an annual operating budget consistent with your multi-year strategic plan/strategic financial plan;
- focus on your school's long-term sustainability as you align your strategic plan, your strategic financial plan, and your resulting annual operating budget;
- recommend tuition and salary adjustments annually, conforming with the implications of the strategic financial spreadsheet;
- understand audited financial reports; and
- engage with your Head Support and Evaluation Committee.

This workshop is for:

New School Heads and those who want to better understand their school's financial position

Tuition Information:

Platinum Member: \$1,274 // **\$1,146.60 Early Bird**
 Gold Member: \$1,456 // **\$1,310.40 Early Bird**
 General: \$1,820 // **\$1,638 Early Bird**

 **Bring your team!** Pay only \$1,092 tuition for each additional team member.



“I learned so much and am excited about the new possibilities ... you sparked my interest even more about going into Headship!”

Claudine Cieutat, *Lower School Principal*
Canterbury School of Florida, FL

Save the Date

26th Annual Heads Retreat

NOVEMBER 2-5, 2022

SAN DIEGO, CA

Take time to explore the latest research, reflect on your practice, create connections with fellow School Heads! Relax, reflect, and rejuvenate in 2022!

Visit go.isminc.com/headsretreat2022 and sign up to receive the latest updates for the Heads Retreat.





Strategic Financial Planning: A Comprehensive Approach

 June 21–23

30 IACP & BCP CREDITS isminc.com/iacp & isminc.com/bcp

Led by: **Terry L. Moore, BCP-E** • 19th year leading
Executive Consultant, ISM

Strategic planning helps reset a school's direction and brings about meaningful institutional growth. Understand the important elements that are required to create an effective strategic plan.

Discuss effective Board structure, explore your school's marketplace stance, and learn how to quantify your school's perceived value. Discover the steps you must take now to protect your school for the future.

You'll learn how to:

- use ISM's 13-line financial planning model to support your school's strategic plan;
- identify your critical, high-impact, strategic numbers, and translate those into an understandable, user-friendly communications tool for your Board and Leadership Team; and
- calculate your Stability Marker™ score—items that strongly correlate to a school's ability to sustain excellence over time—using our proven criteria.

This workshop is for:


Board Presidents, Chairs of Finance Committees and other key Board-committee leaders, School Heads, COOs, CFOs, Business Managers, and other senior administrators

Tuition Information:

Platinum Member: \$1,274 // \$1,146.60 Early Bird

Gold Member: \$1,456 // \$1,310.40 Early Bird

General: \$1,820 // \$1,638 Early Bird

 **Bring your team!** Pay only \$1,092 tuition for each additional team member.



“This was an excellent seminar ... to the point and very well laid out. Terry was one of the best leaders I have had.”

Mino Padda, *Director of Finance and Operations*
Southpointe Academy, Canada

The Vital Role of the Executive or Administrative Assistant

 June 27–30

Led by: **Liz Layne** • 1st year leading
Summer Institute Faculty, ISM
Director of the Head of School Office and Board Relations,
The Ethical Culture Fieldston School, NY

The role of the executive or administrative assistant is vital to school operations. In many ways, you are the glue that holds your school together. But this job also comes with its challenges. Become a valuable leader by partnering with ISM for professional development and peer networking.

You'll learn how to:

- lead from your support position to benefit your school and yourself;
- design a self-evaluation system to chart your professional development;
- use hi- and lo-tech time management tools to achieve better results;
- use current technology to strategically navigate your busy day and add value to your role; and
- prepare for the evolution of the administrative support role.

This workshop is for:


Executive assistants of various experience levels, assistants to School Heads and Division Heads, and receptionists with one year of experience in a support staff position. Assistants to Directors in Admission, Advancement, and the Business Office are also invited to attend

Tuition Information:

Platinum Member: \$2,716 // \$2,444.40 Early Bird

Gold Member: \$3,104 // \$2,793 Early Bird

General: \$3,880 // \$3,492 Early Bird

 **Bring your team!** Pay only \$2,328 tuition for each additional team member.



“The leader did a great job! I am thankful she took the time to speak with me one-on-one and answer my questions and concerns.”

Stephanie Thornton, *Executive Assistant*
Providence Classical Academy, LA

The New School Business Officer

 June 27–July 1 in Philadelphia, PA

40 BCP CREDITS isminc.com/bcp

Led by: **Toni Boyd** • 16th year leading
Adjunct Consultant, ISM | Vice President for Finance
and Operations, The Westminster Schools, GA

Excel as a strategic business leader, whether you're new to the profession or starting in independent schools for the first time.

Whether you're new to the Business Office or new to private-independent schools, learn what it takes to be successful in your first years in this vital role.

Master the tactics you must know to move your Business Office forward and discover how to support your private-independent school's mission for years to come.

You'll learn how to:

- employ strategic governance in your school;
- use ISM's research-based system for constructing a strategic plan and strategic financial plan;
- construct or refine your financial aid process;
- determine how your school's tuition-setting process can match your mission;
- identify how to create effective Business Office administrative processes;
- build guidelines for dealing with difficult situations; and
- recognize how to protect and preserve your school's assets.

This workshop is for:


Business Managers, Controllers, and Business Officers who are new to their position or new to private-independent schools

Tuition Information

Platinum Member: \$3,640 // **\$3,276 Early Bird**

Gold Member: \$4,160 // **\$3,744 Early Bird**

General: \$5,200 // **\$4,680 Early Bird**

 **Bring your team!** Pay only \$3,120 tuition for each additional team member.



“I really appreciate the knowledge, dedication, commitment, and authenticity of the presenters. I learned more about myself as a leader.”

Delvin Dinkins, Assistant Head of School
The Pingry School, NJ

Dollars and Sense for the New School Head

 July 25–27 | 30 BCP CREDITS isminc.com/bcp

Led by: **Terry L. Moore, BCP-E** • 19th year leading
Executive Consultant, ISM

Shannan Schuster, Ed.D. • 2nd year leading
Consultant, ISM

The School Head is ultimately accountable for prudent fiscal management for the school. Whether you're a brand-new Head or one who wants a refresher on financial management, discover how to develop a fiscal success framework to ensure your school's success.

Rely on ISM's tools and strategies to help you feel more confident in conversations and support the long-term financial viability of your school.

You'll learn how to:

- develop an annual operating budget consistent with your multiyear strategic plan/strategic financial plan;
- focus on your school's long-term sustainability as you align your strategic plan, your strategic financial plan, and your resulting annual operating budget;
- recommend tuition and salary adjustments annually, conforming with the implications of the strategic financial spreadsheet;
- understand audited financial reports; and
- engage with your Head Support and Evaluation Committee.

This workshop is for:


New School Heads and those who want to better understand their school's financial position

Tuition Information:

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Gold Member: \$1,456 // **\$1,310.40 Early Bird**

General: \$1,820 // **\$1,638 Early Bird**

 **Bring your team!** Pay only \$1,092 tuition for each additional team member.



“I am not a new Head but each time I engage with ISM, I find such value in the teachings (even those for which I am familiar). I love that ISM is so forward-thinking.”

Karen McCulla, Head of School
Brockton School, Canada



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FINANCIAL AID SERVICE

We **verify** your parents' taxes so you don't have to.

Don't be forced to change financial aid systems and do verifications on your own. Whether you have hundreds of applications or just a few to manage, trust ISM's full in-house team that still verifies each and every applicant's tax documents.

Built on 45+ years of experience in developing private-independent school theory and best practices, FAST® helps you feel confident that your financial aid award process fills seats with deserving, mission-appropriate students. We're here with the best support team in the industry to get you started quickly and easily.

How FAST can save you time this financial aid season:

VERIFICATION

Verify your parents' tax documents in days—not weeks—with ISM's in-house tax team.

FORMULA

Rely on the industry's only built-in business income formula to determine a business owner's REAL cash flow.

TRANSPARENCY

Experience complete award formula transparency so you never question an award again.

ONBOARDING

Onboarding is easy. Hit the ground running in as little as two days.



Get started today. Schedule a demo at ismfast.com.



How to Transform Your Existing Website Into an Inquiry Machine

 June 21–22 | 20 IACP CREDITS isminc.com/iacp

Led by: **Penny Abrahams, IAP-L** • 14th year leading
Consultant & Advancement Academy Convener, ISM

Clint Losch • 4th year leading
Director of Business Development, Powered by ISM (PBI)

Nearly every prospective family will spend time on your school's website before contacting you or attending an admission event. It's critical that your site is optimized to convert web traffic into inquiries; otherwise, you will waste time and money on marketing tactics that don't produce results.

But what if you could create strategic “conversion pathways” that seamlessly and subtly compel your website visitors to take a desired action? Discover exactly how you can update and enhance your existing website to generate even more inquiries (and ultimately applications) from your website visitors.

You'll learn how to:

- leverage the main “conversion pathways” proven to drive more inquiries;
- implement the one type of page that every school website now needs (yet few have);
- grow your database of prospective families without capturing a formal inquiry;
- boost event and tour registrations using your existing website; and
- do all of this without redesigning your site!

This workshop is for:


School Heads, Admission and Enrollment Managers, and marketing communications professionals

Tuition Information:

Platinum Member: \$1,015 // **\$913.50 Early Bird**

Gold Member: \$1,160 // **\$1,044 Early Bird**

General: \$1,450 // **\$1,305 Early Bird**

 **Bring your team!** Pay only \$870 tuition for each additional team member.



“Both Penny and Clint were informative and knowledgeable. They packed a lot of content into the workshop!”

Emily Prigg, *Communications Manager*
Capitol Hill Day School, Washington, DC

“Thank you for sharing your time and expertise. You led an inclusive workshop where I felt welcome, valued, and seen.”

Andrea Duwel, *Director of Admissions*
Notre Dame High School CA

The New Admission Director

 June 21–23 | 30 IACP CREDITS isminc.com/iacp

Led by: **Casey Bell, IAP-L** • 4th year leading
Summer Institute Faculty, ISM | Director of Enrollment Management, All Saints' Episcopal School, TX

 June 27–30 in Philadelphia, PA

Led by: **Mary Yorke Oates** • 2nd year leading
Summer Institute Faculty, ISM | Director of Admissions, Charlotte Latin School, NC

New Admission and Enrollment Management Directors: Learn how to build an effective team that understands and utilizes the admission funnel so you can generate more applications and inquiries from day one.

Understand the admission funnel and how to design and implement a meaningful marketing strategy.

Begin to think strategically about your school's opportunities and challenges as they relate to enrollment and retention. Build confidence in your role as Admission Director and cement your relationship with the other members of your team.

You'll learn how to:

- adopt new tools and techniques around events, visits, and integrated messaging;
- build a productive, healthy culture of service to support your school's mission;
- evaluate your niche in the marketplace and consider ways to elevate your presence; and
- develop ambassadors through education and training.

This workshop is for:

Admission Directors, Enrollment Management Directors, Officers, and personnel with three years of experience or less

Tuition Information:


ONLINE

(Accelerated courses for busy individuals who prefer to learn from their home or office)

Platinum Member: \$1,274 // **\$1,146.60 Early Bird**

Gold Member: \$1,456 // **\$1,310.40 Early Bird**

General: \$1,820 // **\$1,638 Early Bird**

 **Bring your team!** Pay only \$1,092 tuition for each additional team member.




IN-PERSON

(Immersive learning experience with more opportunities to network with like-minded individuals)

Platinum Member: \$2,716 // **\$2,444.40 Early Bird**

Gold Member: \$3,104 // **\$2,793 Early Bird**

General: \$3,880 // **\$3,492 Early Bird**

 **Bring your team!** Pay only \$2,328 tuition for each additional team member.



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Build and Grow a Robust Annual Fund

 June 22–24 | 30 IACP CREDITS isminc.com/iacp

Led by: Michael Christopher • 20th year leading Consultant, ISM

The foundation of your school's culture of philanthropy begins with a strong annual fund. Discover how to build a thriving annual fund strategy that drives relationships, generates enthusiasm, and raises dollars—enabling your school to go above and beyond in delivering your mission to your students.

You'll learn how to:

- set your annual fund goal based on data, not on guesswork;
- recruit volunteer leaders to serve on your Annual Fund Cabinet;
- identify and solicit your most interested donors;
- share your school's story and reasons for support—elements that inspire your constituents to give;
- personalize and segment donors and prospects;
- create a format for building a strategic annual fund calendar; and
- develop your action plan and prioritize the next steps.

This workshop is for:


Both new and experienced Development Directors and development staff, annual fund managers, data managers, and volunteer annual fund leadership

Tuition Information:

Platinum Member: \$1,274 // \$1,146.60 Early Bird

Gold Member: \$1,456 // \$1,310.40 Early Bird

General: \$1,820 // \$1,638 Early Bird

 **Bring your team!** Pay only \$1,092 tuition for each additional team member.



“This was a very effective and helpful workshop. Thank you!! It was well worth the money.”

Jessica Hayes, Head of School
The Montessori School of Fort Smith, AR

Capital Campaign Mastery: Design and Implement an Extraordinary Campaign

 June 27–30 in Philadelphia, PA

30 IACP CREDITS isminc.com/iacp

Led by: Herbert P. Soles, CFRE, IAP-L • 16th year leading Consultant, ISM

Your school, whether large or small, can run a successful capital campaign—with the correct preparation. Explore the dynamics of independent school fundraising to support your school's ability to make a difference for your students. Become more confident in your own role and understand how to maximize the capacity of your volunteer and donor base.

You'll learn how to:

- prepare before a campaign, focusing on your school's size, history, and culture;
- determine essential planning steps to help your school successfully reach its goals;
- write a dynamic campaign plan;
- inspire, coach, and train volunteers and staff members to be dynamic fundraisers;
- lead personnel to manage time and the financial resources of a campaign;
- ask individuals for large gifts (known as major gifts fundraising) and explore techniques to increase potential gift size; and
- avoid common pitfalls of each stage of the campaign.

This workshop is for:


School Heads, Development Directors, Major Gift Officers, CFOs, Trustees, and Development Committee members

Tuition Information:

Platinum Member: \$2,716 // \$2,444.40 Early Bird

Gold Member: \$3,104 // \$2,793 Early Bird

General: \$3,880 // \$3,492 Early Bird

 **Bring your team!** Pay only \$2,328 tuition for each additional team member.



“Great session. Herb has lots of experience and stories that helped me relate to certain scenarios. It was very helpful for thinking through potential roadblocks.”

Floy Collis, Advancement Director
Caldwell Academy, NC

The New Marketing Communications Director

 June 27–30 in Philadelphia, PA

30 IACP CREDITS isminc.com/iacp

Led by: Penny Abrahams, IAP-L • 14th year leading
Consultant & Advancement Academy Convener, ISM

The efforts of a school's Marketing Communications Office are integral to its future. This team provides a unified message to a school's faculty, staff, students, families, and the larger community.

Discover how to excel as the Director of this team. We'll also explore new tactics you should take post-COVID-19.

You'll learn how to:


- see the big picture of how marketing communications serves your entire school;
- assess what you should do this year in the wake of COVID-19;
- adapt our templates so you can create a strategic marketing plan, schoolwide communication calendar, social media strategy, and crisis communication plan; and
- develop an action plan to implement right away.

This workshop is for:

Marketing communications professionals who are new or less-experienced in their roles. It's also ideal for individuals with marketing experience but who are new to the private school world

Tuition Information:

Platinum Member: \$2,716 // \$2,444.40 Early Bird
Gold Member: \$3,104 // \$2,793 Early Bird
General: \$3,880 // \$3,492 Early Bird

 **Bring your team!** Pay only \$2,328 tuition for each additional team member.



“This was the most immediately useful workshop I have ever attended! I wish I had done it years ago!”

Lori Paredes, Director of Communication
The Regis School of the Sacred Heart, TX

The New Development Director

 July 11–15 in Philadelphia, PA

30 IACP CREDITS isminc.com/iacp

Led by: Michael Christopher, IAP-L • 20th year leading
Consultant, ISM

L.J. Mitchell, IAP-L • 15th year leading
Summer Institute Faculty, ISM | Director of Development,
The Calhoun School, NY

Understanding the components of an effective development operation—and how those components interface with your school's strategic priorities—is critical to your success as a Development Director.

Whether you're new to the position or need to adapt your current skills to a private school context, this workshop provides training and support as you define your priorities—creating an action plan for the coming year.

You'll learn how to:


- use the foundations of private school development and fundraising theory to bolster your efforts;
- ensure development fits into the overall advancement efforts of your school;
- lead a donor-centered development program that inspires your Board and energizes your fundraising efforts;
- adjust your development plan to the new realities following the COVID-19 crisis;
- identify your professional and volunteer leadership teams;
- create an effective action plan that is achievable and measurable; and
- develop a network of professionals who provide support and knowledge of what works in other schools.

This workshop is for:

Development Directors who are new to their positions or new to private schools, and Development Office staff members with cross-functional responsibilities or future director expectations

Tuition Information:

Platinum Member: \$3,640 // \$3,276 Early Bird
Gold Member: \$4,160 // \$3,744 Early Bird
General: \$5,200 // \$4,680 Early Bird

 **Bring your team!** Pay only \$3,120 tuition for each additional team member.



“The workshop leaders are experts who were not only knowledgeable and engaging, but a delight to learn from. I would be interested in taking more workshops from them, specifically.”

Nikea Johnson, Director of Development
Westside Neighborhood School, CA



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Mastering Enrollment Management

 August 1–3 | 30 IACP CREDITS isminc.com/iacp

Led by: **Casey Bell, IAP-L** • 4th year leading
Summer Institute Faculty, ISM | Director of Enrollment Management, All Saints' Episcopal School, TX

Discover the truth: ALL the factors challenging your enrollment can be fixed, and most “fixes” cost you nothing! Don’t suffer from unpredictable enrollment outcomes anymore.

Unveil the root causes for declining or flatlining enrollment at your school. Learn how to collect and use data to determine the nature of the decline—and to pinpoint specific strategies to address the contributing factors.

You’ll learn how to:

- identify your school’s primary competitive edge in the private-independent school marketplace—and position your school as an educational influencer within your immediate market;
- validate your school’s mission experience for your current students and effectively communicate that experience to prospective families;
- ensure consistent messaging to students and families by getting all school staff and administrators “on the same page” to serve the same educational mission;
- ask students and teachers about their experiences at your school—and have their answers inform your messaging and branding; and
- leverage your financial aid program in a way that serves your school’s community and its mission, instead of giving away money you may not have to families who don’t truly need it.

This workshop is for:


Admission Directors, Division Heads/Principals, Marketing Communications Directors, CFOs, Advancement Directors, and School Heads

Tuition Information:

Platinum Member: \$1,274 // **\$1,146.60 Early Bird**

Gold Member: \$1,456 // **\$1,310.40 Early Bird**

General: \$1,820 // **\$1,638 Early Bird**

 **Bring your team!** Pay only \$1,092 tuition for each additional team member.



“The Consultant had great energy and enthusiasm for this topic. I appreciate their openness to discussion and willingness to be available during the workshop and afterwards.”

Jennifer Nye, *Director of Enrollment Management*
Beaumont School, OH



Wherever you are in your career, there is a milestone to strive toward that showcases your dedication to excellence.

ISM’s certification programs help you stay on course by encouraging you to set professional goals, network with industry professionals, and seize new opportunities throughout your career.

INTERNATIONAL ADVANCEMENT CERTIFICATION PROGRAM

Demonstrate your excellence and gain recognition for your skills in Marketing Communications, Development, Admission, and Enrollment Management through ISM’s International Advancement Certification Program. The program offers three levels of certification to set you apart and mark your achievements.

isminc.com/iacp



BUSINESS CERTIFICATION PROGRAM

Highlight your business acumen through ISM’s Business Certification Program. Commit to continuous learning through three levels of certification and demonstrate your thorough knowledge of sound private-independent school business operations.

isminc.com/bcp





Engage in the Joy of Learning

Have you missed the excitement and collaboration among colleagues and peers? So have we. Check out our favorite Summer Institute memories and join us this year to make new ones!



Is our school financially solvent, even if a crisis occurs?

Is our technology built to support and protect teachers and students?

Is our Board mission-driven and focused on long-term viability?

Does our curriculum help students grow into well-rounded adults?

If you answered **“no”** or **“I’m not sure”** to these questions, you need customized support and a plan for success.

Your school—and its challenges—are unique. Rely on ISM’s 45+ years of unparalleled experience and research to help you answer “yes!” with confidence. Our virtual and onsite consulting services are customized to fit your unique needs and accommodate budgets of all sizes.

Secure your school’s finances

Provide your leaders with a data-driven analysis of your school’s strengths, challenges, and goals. We’ll give you the resources required to bring those goals to reality.

STRATEGIC FINANCIAL PLANNING
CONSULTATION

Audit and upgrade your technology

Create a campus-wide technology plan that encompasses initiatives and priorities. Define a road map that reflects your mission and vision.

STRATEGIC TECHNOLOGY PLANNING
CONSULTATION

Ensure student-centered academics

Build an academic framework that’s best for students with a look at your schedule, curriculum, instructional approach, and professional growth.

STRATEGIC ACADEMIC PLANNING
CONSULTATION

Empower and align your Board

Feel confident that your Trustees are aligned on strategic priorities for the future that safeguard your students and deliver your mission with excellence.

BOARD LEADERSHIP TRAINING
CONSULTATION

Say **“yes”** with confidence. Email schoolsuccess@isminc.com to learn more.





How to Successfully Transition From Teacher to Administrator

 June 21–22

Led by: **Barbara Beachley** • 11th year leading
Consultant & Executive Director of Organizational Learning and Development, ISM

If you're considering a move into private school administration, gain the tools and strategies to be successful. Examine what it means to be an academic administrator in a private school; recognize your leadership vision and motivations; and learn how to make the move effectively. Discover how to prepare and what to expect so you can make sound decisions for your future.

You'll learn how to:

- navigate the expectations and responsibilities of an academic leader within the context of school operations;
- support the relationship between faculty culture and the student experience;
- prepare for the transition from teacher to administrator; and
- demonstrate your motivations, strengths, and interests related to leadership.

This workshop is for:


Current teachers and Department Chairs

Tuition Information:

Platinum Member: \$1,015 // **\$913.50 Early Bird**

Gold Member: \$1,160 // **\$1,044 Early Bird**

General: \$1,450 // **\$1,305 Early Bird**

 **Bring your team!** Pay only \$870 tuition for each additional team member.



“Barbara was the perfect leader for this workshop. The best aspect was that she was approachable and honest. There is a clear passion for what she does and she definitely wants us all to succeed.”

Catherine Eppler, *Science Teacher*
Saint Peter's Preparatory School, NJ

Transforming Student Assessment: Determining Authentic Evidence of Learning

 June 21–22

Led by: **Mike Gwaltney** • 8th year leading
Consultant & Director of Online Learning, ISM

Are your students involved in meaningful, hands-on work that keeps them actively engaged? Do they produce work and perform tasks that they believe are meaningful?

Too many schools and teachers simply fall back on traditional assessments and grading formulas. Most often, these are not true markers of student understanding.

It's time to think about your school's approach to assessment—that is, how you measure evidence of learning and achievement. Explore how to assess learning that illustrates true comprehension and make changes moving forward.

You'll learn how to:

- align assessment and teaching with your school's most profound and meaningful educational goals;
- communicate to teachers and parents that measuring students' higher-order thinking, personal development, and engagement is as qualifying as their mastery of basic skills and content;
- encourage a school-wide focus on student curiosity and engagement with deep learning; and
- collect and report evidence of critical thinking, creativity, curiosity, citizenship, and other skills and behaviors that matter.

This workshop is for:


School Heads, Division Heads, faculty, Academic Deans, Department Chairs, other academic leaders, teachers

Tuition Information:

Platinum Member: \$1,015 // **\$913.50 Early Bird**

Gold Member: \$1,160 // **\$1,044 Early Bird**

General: \$1,450 // **\$1,305 Early Bird**

 **Bring your team!** Pay only \$870 tuition for each additional team member.



“Mike is an engaging leader who ensures his lessons are a good mix of anecdotal stories and current pedagogy. Very informative and very useful.”

Gord Wotherspoon, *Lower School Teacher*
Crescent School, Canada

Master the NCAA Recruiting Process

 June 21–22

Led by: **Ira Childress** • 2nd year leading
Summer Institute Faculty, ISM
Assistant Athletic Director of Player Relations at
LSU Football, Louisiana State University, LA

Kurt Ruch • 2nd year leading
Summer Institute Faculty, ISM
Athletic Director, George School, PA

As a private school Athletic Director, college counselor, or coach, are you concerned that you don't know how to help student-athletes navigate the ever-changing college athletic recruitment process? Discover the steps you need to take to increase student-athlete visibility to college coaches, improve your athletic program's marketing and branding to attract new students, and give students every opportunity to achieve their collegiate sports dreams.

You'll learn how to:


- leverage a simple, yet effective, way to approach the college athletic recruiting process so that you can help your coaches, student-athletes, and families;
- use social media to maximize student-athlete exposure for athletic recruitment; and
- build your toolbox of recruiting communication templates to improve efficiency and save time.

This workshop is for:

Athletic Directors and other counselors who work with student athletes

Tuition Information:

Platinum Member: \$1,015 // **\$913.50 Early Bird**
 Gold Member: \$1,160 // **\$1,044 Early Bird**
 General: \$1,450 // **\$1,305 Early Bird**

 **Bring your team!** Pay only \$870 tuition for each additional team member.



Build a Strong Advisory Program

 June 21–24

Led by: **Bryan Smyth, Ph.D.** • 8th year leading
Senior Consultant & Director of Research, ISM

A successful advisory program is a difference-maker for middle and upper school students. How does yours rate?

In this highly interactive workshop, educators explore core concepts for focusing, enhancing, and building (or rebuilding) the advisory program so it reflects and supports the mission of the school.

You'll learn how to:


- articulate your purpose and develop a set of expected outcomes for your program;
- analyze the quality of your program given those purpose and outcomes;
- guide students, teachers, and parents through the advisory system;
- redesign your program to achieve intended outcomes; and
- put your time, people, and space to good use to improve your advisory program.

This workshop is for:

Middle and upper school educators who are new to advisory, as well as those who want to revamp their advisory programs

Tuition Information:

Platinum Member: \$1,526 // **\$1,373.40 Early Bird**
 Gold Member: \$1,744 // **\$1,569.60 Early Bird**
 General: \$2,180 // **\$1,962 Early Bird**

 **Bring your team!** Pay only \$1,308 tuition for each additional team member.



“This was my first workshop with ISM and I found it very well paced and well done. Individual questions and concerns were addressed!”

Taylor Kelly, *Assistant Athletic Director*
 Norfolk Collegiate School, VA

“Bryan did an excellent job presenting the course content, responding to our questions and needs, and offering ideas that we could bring back to our schools' advisory programs!”

Michele van Kalsbeck, *Theology Teacher*
 Upper School Campus Ministry team member
 Oak Knoll School of the Holy Child, NJ



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, ISM will credit the tuition you paid toward another similarly priced workshop or refund your tuition up to 100%.



How to Build a Successful Growth Coaching Program

 June 23–24

 June 27–29 in Philadelphia, PA

Led by: **Barbara Beachley** • 11th year leading
*Consultant & Executive Director of Organizational Learning
and Development, ISM*

Mike Gwaltney • 8th year leading
Consultant & Director of Online Learning, ISM

Growth-oriented teachers are a hallmark of a great school. Conversely, teachers who do not model the growth they want to see in their students tend to fail over time. Explore how to build a team of faculty leaders who coach and support each other.

You'll learn how to:

- develop a cohort of growth coaches who ask the right questions;
- inspire faculty to stretch themselves, personally and professionally;
- hold teachers accountable for putting new ideas and skills into practice;
- motivate and encourage teachers to grow in their practice every year;
- practice distributive leadership by developing a team of coaches who have the enthusiasm and skills to give teachers the support they need; and
- ensure that all faculty are encouraged to set meaningful growth goals and achieve them.

This workshop is for:

Academic Deans, Division Heads, School Heads, and others who oversee faculty

Tuition Information:


ONLINE

(Accelerated courses for busy individuals who prefer to learn from their home or office)

Platinum Member: \$1,015 // **\$913.50 Early Bird**

Gold Member: \$1,160 // **\$1,044 Early Bird**

General: \$1,450 // **\$1,305 Early Bird**

 **Bring your team!** Pay only \$870 tuition for each additional team member.




IN-PERSON

(Immersive learning experience with more opportunities to network with like-minded individuals)

Platinum Member: \$2,030 // **\$1,827 Early Bird**

Gold Member: \$2,320 // **\$2,088 Early Bird**

General: \$2,900 // **\$2,610 Early Bird**

 **Bring your team!** Pay only \$1,740 tuition for each additional team member.



Scheduling the Elementary School Program

 June 27–29 in Philadelphia, PA

Led by: **Roxanne S. Higgins** • 39th year leading
*President, Director of Consultants, &
Senior Executive Consultant, ISM*

Andrew Taylor, Ed.D. • 5th year leading
Consultant, ISM

Learn unique processes and principles to address the specific scheduling challenges of the lower school. Discover what the ideal lower school schedule should include, identify your program and space requirements, and design a schedule with instructor assistance and critique that meets your school's mission. Return to your school with a finalized schedule (or schedule prototype).

You'll learn how to:

- discover where your school currently stands, based on your unique data;
- define what the ideal lower school schedule includes;
- work with your school's space, time, people, and program limitations;
- use strategies for time and space management;
- lay the foundation for your new lower school schedule, including how to establish interdivisional and intradivisional time, personnel, and space; and
- create your new lower school schedule with the leader's assistance and critique.

This workshop is for:


Lower School Heads and schedulers

Tuition Information:

Platinum Member: \$2,030 // **\$1,827 Early Bird**

Gold Member: \$2,320 // **\$2,088 Early Bird**

General: \$2,900 // **\$2,610 Early Bird**

 **Bring your team!** Pay only \$1,740 tuition for each additional team member.



“The biggest value is understanding the research behind scheduling and best practices. I now have facts and data for why I am making the changes to the lower school schedule.”

Amy Maier, Head of Lower School
Madison Country Day School, WI

“Both leaders were outstanding. They are very knowledgeable and helpful.”

Brenda Montgomery, Director of Academic Innovation
and Growth
Selwyn House School, Canada

Mastering Your Role as Middle School Dean of Students

 June 27–30 in Philadelphia, PA

Led by: **Jay Dean** • 1st year leading
Summer Institute Faculty, ISM
Middle School Director, The Blake School, MN

Middle School Deans wear many hats: teacher, advisor, disciplinarian, coach, administrator, and more. Learn how to set goals, satisfy the needs of multiple stakeholders, communicate effectively, and find time for self-care. Participants will be asked to bring resources from their schools to help create an action plan for the first 100 days of the school year.

You'll learn how to:


- create scripts and scenarios to guide you in challenging conversations with multiple stakeholders (parents, students, faculty members, other school administrators);
- establish student expectations and discipline protocols;
- successfully implement student-life programs, such as student interest groups and affinity and ally groups; and
- sustain a healthy work-life balance, including incorporating time for self-care.

This workshop is for:

Middle School Deans of Students who are in their first five years in the role

Tuition Information:

Platinum Member: \$2,716 // **\$2,444.40 Early Bird**
 Gold Member: \$3,104 // **\$2,793 Early Bird**
 General: \$3,880 // **\$3,492 Early Bird**

 **Bring your team!** Pay only \$2,328 tuition for each additional team member.



Student-Centered Scheduling

 June 27–July 1 in Philadelphia, PA

Led by: **Bryan Smyth, Ph.D.** • 8th year leading
Senior Consultant & Director of Research, ISM

Shannon Shuster, Ed.D. • 2nd year leading
Consultant, ISM

Creating your next school schedule doesn't have to be a caffeine-fueled, angst-driven exercise in futility. This workshop takes you back to basics and refocuses your scheduling strategy on what's best for your students rather than what may be most convenient for adults.

You'll learn how to:


- evaluate your school's current schedule design;
- challenge the assumptions and myths of traditional approaches to schedule design;
- address the parameters and conflicts within your schedule that are hindering your program (such as cross-over teachers, single-section courses);
- design a better schedule for your school; and
- effectively manage the change process.

This workshop is for:

Middle and Upper Division Heads/Principals, School Heads, and other administrators and faculty leaders involved in scheduling school classes

Tuition Information:

Platinum Member: \$3,640 // **\$3,276 Early Bird**
 Gold Member: \$4,160 // **\$3,744 Early Bird**
 General: \$5,200 // **\$4,680 Early Bird**

 **Bring your team!** Pay only \$3,120 tuition for each additional team member.



“The most valuable aspect is the confidence I now have in my abilities. The resources provided as well as contacts with peers will prove very useful.”

Michelle Gallivan-Wallace, *Lower/Middle School Dean*
 Sage Ridge School, NV

“I came to this workshop as a complete novice with the plan of being an observer. I am leaving with many tools and ideas on how to move our teacher- and specials-driven schedule to a more student-centered model.”

Susy Willetts, *Lower School Academic Coordinator,*
5th Grade Mathematics
 The Covenant School, VA



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, ISM will credit the tuition you paid toward another similarly priced workshop or refund your tuition up to 100%.



Directing the Athletic and PE Programs

 July 11–14 in Philadelphia, PA

Led by: **Mary Jo Pruitt** • 7th year leading
Summer Institute Faculty, ISM
Director of Athletics, Castilleja School, CA

Athletics fills an important role on a school's campus. The Athletic Director must ensure the school's athletic program operates effectively to provide student-athletes with an optimal experience—extending their school experiences to the playing field.

Learn how to create and implement physical education initiatives that encourage students to lead happy and healthy lives, while maintaining policies that protect their safety.

You'll learn how to:


- define your athletic program mission statement—providing a baseline set of priorities for other decisions;
- factor in legal and diversity issues to ensure your program is well-rounded and all-inclusive;
- use an effective evaluation process to build and lead a great team;
- design a program that entices teachers to lead sports programs; and
- create a welcoming environment for student-athletes to meet their individual needs and positively affect the school's mission.

This workshop is for:

Athletic Directors and administrators directly involved in their schools' student athletics and physical education programs, especially newer leaders

Tuition Information:

Platinum Member: \$2,716 // **\$2,444.40 Early Bird**
Gold Member: \$3,104 // **\$2,793 Early Bird**
General: \$3,880 // **\$3,492 Early Bird**

 **Bring your team!** Pay only \$2,328 tuition for each additional team member.



“It was an excellent workshop for a new athletic director to take. I really appreciated the time you took to create materials for us and answer questions.”

Alexander Ebling, Teacher, Basketball & Softball Coach
Newton Country Day School, MA

Balance Your Roles as Upper School Dean of Students

 July 11–15 in Philadelphia, PA

Led by: **Jessica Clark** • 8th year leading
Summer Institute Faculty, ISM
Dean of Student Life, National Cathedral School for Girls, DC

The Upper School Dean of Students must balance working as an advocate for the students and as a disciplinarian to support the school culture. Attend this workshop to explore how to manage these roles while furthering your school's mission and prioritizing the well-being of your students.

You'll learn how to:


- create dynamic and robust student life programs that provide all students with opportunities for growth and leadership in areas they are passionate about;
- help students and their parents overcome the pitfalls of adolescence today, including mental health concerns, drug and alcohol abuse, harassment and bullying issues, and appropriate use of social media;
- develop a school culture plan that encourages student engagement through mission-focused decision-making that supports adolescent growth;
- evaluate your personal leadership style and methods to develop faculty and student leaders in your school community; and
- lead from a place of authenticity, with student growth at the center of the conversation.

This workshop is for:

Upper School Deans of Students

Tuition Information:

Platinum Member: \$3,640 // **\$3,276 Early Bird**
Gold Member: \$4,160 // **\$3,744 Early Bird**
General: \$5,200 // **\$4,680 Early Bird**

 **Bring your team!** Pay only \$3,120 tuition for each additional team member.



“So grateful to be a part of this! The resources and breakout sessions were so helpful.”

Marcus Janzen, High School Assistant Principal
King's Way Christian Schools, WA

Chairing Your Department: The First Five Years

 July 11–15 in Philadelphia, PA

 July 25–29

Led by: **Mike Gwaltney** • 8th year leading
Consultant & Director of Online Learning, ISM

Department Chairs must act as an essential bridge between a school's Leadership Team and the faculty. Explore strategies for exercising leadership, communicating openly, and running your department effectively. Discover how to facilitate change and support your colleagues to deliver your mission with excellence.

You'll learn how to:

- examine leadership challenges, develop critical interpersonal competencies, and address changes that occur as teachers take on new responsibilities;
- implement techniques to manage your teaching staff, while also managing your time;
- create effective strategies for departmental management, curricular design, and communication;
- develop mission-appropriate processes for curriculum development and review, quality instructional techniques, and student assessment and management; and
- cultivate a peer network to leverage for advice and insight for the rest of your career.

This workshop is for:

Department Chairs, grade-level team leaders, and those who aspire to this work

Tuition Information:


IN-PERSON

(Immersive learning experience with more opportunities to network with like-minded individuals)

Platinum Member: \$3,640 // **\$3,276 Early Bird**

Gold Member: \$4,160 // **\$3,744 Early Bird**

General: \$5,200 // **\$4,680 Early Bird**

 **Bring your team!** Pay only \$3,120 tuition for each additional team member.




ONLINE

(Accelerated courses for busy individuals who prefer to learn from their home or office)

Platinum Member: \$1,771 // **\$1,593.90 Early Bird**

Gold Member: \$2,024 // **\$1,821.60 Early Bird**

General: \$2,530 // **\$2,277 Early Bird**

 **Bring your team!** Pay only \$1,518 tuition for each additional team member.



Leading the Effective Lower School

 July 11–15 in Philadelphia, PA

Led by: **Andrew Taylor, Ed.D.** • 5th year leading
Consultant, ISM

Kelly Bird • 2nd year leading

Summer Institute Faculty, ISM

Director, Early Learning Center, Renbrook School, CT

Learn effective strategies for leading your lower school. Discover ways to build and sustain a healthy staff of administrators and faculty who deliver your mission with excellence. Start your school year well-equipped to lead your division to greater heights with a self-designed action plan ready to implement on day one.

You'll learn how to:

- develop your management and leadership skills, including time management and engaging in difficult conversations;
- create an effective, student-centered learning environment;
- support a positive faculty culture, ensuring you provide predictability and support to improve teachers' morale and effectiveness;
- prioritize self-care and an intentional focus on wellness for yourself and for those you work with;
- identify your "key communicators" and learn how to use their skills effectively;
- manage change and respond calmly to crisis; and
- outline the first 100 days of your school year in your personalized action plan.

This workshop is for:


Lower School Division Directors, Lower School Heads, and Elementary Principals

Tuition Information:

Platinum Member: \$3,640 // **\$3,276 Early Bird**

Gold Member: \$4,160 // **\$3,744 Early Bird**

General: \$5,200 // **\$4,680 Early Bird**

 **Bring your team!** Pay only \$3,120 tuition for each additional team member.



“It was a fantastic workshop all around! I learned a lot and found it extremely engaging and inspiring.”

*Randall Flinn, Head of Lower School
Grace Church School, NY*

“Mike's ability to flexibly respond to and incorporate participants' needs and comments into the overall flow was phenomenal.”

*Kristian Wilkins, Middle Upper School English Teacher
The Briarwood School, TX*



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Leading the Effective Middle School

 July 11–15 in Philadelphia, PA

Led by: **Javaid Khan** • 3rd year leading

Summer Institute Faculty, ISM
Head of Middle Division, Horace Mann School, NY

Michelle Merson • 3rd year leading

Summer Institute Faculty, ISM
Head of Middle School, Crossroads School for Arts & Sciences, CA

Middle School Heads and administrators must provide support for their students, as well as fair and thoughtful discipline leading to character development. Create an experiential and practical roadmap to help support these goals and more.

Leave with an action plan on how to move your middle school community forward—and a group of peers to provide support and collegiality long after the workshop concludes.

You'll learn how to:

- analyze your personal leadership style based on the latest research about effective leadership;
- apply your school's mission as a guide to decision-making and policy implementation;
- recognize the unique characteristics of middle school-aged children, especially as they impact curriculum, character development, and discipline;
- apply current theory on educational best practices in middle school curriculum, diversity, technology, and innovative learning; and
- facilitate effective teacher coaching, growth, and development.

This workshop is for:


Middle School Division Heads and Principals

Tuition Information:

Platinum Member: \$3,640 // **\$3,276 Early Bird**

Gold Member: \$4,160 // **\$3,744 Early Bird**

General: \$5,200 // **\$4,680 Early Bird**

 **Bring your team!** Pay only \$3,120 tuition for each additional team member.



“Both presenters were engaging and provided the content and support for divisional leaders to be effective. They are both very personable, motivating, and collaborative.”

Maureen Bournazian, *Head of Middle School*
St. Anne School, CA

Leading the Effective Upper School

 July 11–15 in Philadelphia, PA

Led by: **Andy King** • 7th year leading

Summer Institute Faculty, ISM
Upper School Director, Hackley School, NY

Rebecca Zug • 6th year leading

Summer Institute Faculty, ISM
Head of Upper School, Wilmington Friends School, DE

Gain the tools you need to work with colleagues, support faculty growth, and foster a healthy, dynamic culture in your upper school division. Hone your own thinking, develop new ideas and plans, and acquire a network of fellow Upper School Division Heads—who will help you thrive as a successful administrator in today's independent school market.

You'll learn how to:

- balance the demands of your position and better understand effective leadership models;
- make adaptations in your division to incorporate aspects of the pandemic's disruptive model that apply to learning and teaching;
- create an action plan for building a dynamic, positive faculty culture that supports students; and
- develop a network of fellow Division Heads on whom you can rely in the future for support and guidance.

This workshop is for:


Upper School Division Heads and Principals

Tuition Information:

Platinum Member: \$3,640 // **\$3,276 Early Bird**

Gold Member: \$4,160 // **\$3,744 Early Bird**

General: \$5,200 // **\$4,680 Early Bird**

 **Bring your team!** Pay only \$3,120 tuition for each additional team member.



“This was the best workshop and they were the best leaders I have had as an educator.”

Analyn Coker, *Head of Middle and Upper School*
Trinity Presbyterian School, AL

Transformative Academic Leadership

 July 11–15 in Philadelphia, PA

Led by: **Barbara Beachley** • 11th year leading
Consultant & Executive Director of Organizational Learning and Development, ISM

Research shows that a healthy, growth-focused faculty culture is the primary predictor of student performance, satisfaction, and enthusiasm. In an era of “hyperchange,” it is more important than ever to foster a stable culture for students while teaching them to embrace necessary changes for the future. This requires inspired leadership that draws others to action.

School leaders must reconcile competing priorities while still effecting higher-order changes to remain viable and sustainable. This workshop combines practical tools, concrete strategies, cutting-edge research, hands-on activities, and in-depth discussions to support you in embracing the personal and professional challenges that come with leading a student-centered school. Leave this workshop excited to transform your school from excellent to exceptional.

You'll learn how to:


- gain a deeper understanding of who you are as a leader, including your personal strengths and challenges;
- use concrete tools to assess school culture and foster positivity, collegiality, and professional growth among your teachers;
- discuss student-centered approaches, systems, policies, and pedagogy;
- increase your ability to communicate powerfully and effectively with all constituents; and
- create strategies to impact successful change.

This workshop is for:

Academic administrators such as School Heads, Division Heads, Academic Deans, Deans of Faculty, and others who are closely involved with faculty

Tuition Information:

Platinum Member: \$3,640 // **\$3,276 Early Bird**
Gold Member: \$4,160 // **\$3,744 Early Bird**
General: \$5,200 // **\$4,680 Early Bird**

 **Bring your team!** Pay only \$3,120 tuition for each additional team member.



“Thank you for creating a place where educators can get together and learn from each other and from the facilitators of the workshops. I am leaving feeling more confident and equipped with ideas that I can implement when I get back to school. It makes the time and money well worth it.”

Nancy Washburn, *Lower School Principal*
New Life Academy, MN

For Teachers: How to Succeed When You're New to Independent Schools

 July 25–26

Led by: **Josh Nelson, Ph.D.** • 1st year leading
Consultant & Director of Faculty and Curriculum, ISM

Teachers, this workshop is for you! Explore foundational strategies so you can succeed in your new role in an independent school, even if this is your first year teaching.

Starting a new job is always difficult—but independent schools are unlike any other educational setting. Attend this workshop to explore the tools to be successful from day one.

Develop a foundational understanding of how independent schools work, how your school's mission influences your role as a teacher, and how to flourish from the first day in a new school community.

You'll learn how to:


- navigate the different aspects of independent schools—and the role you play within each;
- thrive within independent school culture, handling expectations from parents, students, and fellow employees;
- communicate in-person and online, and learn how to approach different constituent groups;
- set boundaries with families, students, and colleagues; and
- best practices for success.

This workshop is for:

Teachers who have never taught at an independent school before

Tuition Information:

Platinum Member: \$1,015 // **\$913.50 Early Bird**
Gold Member: \$1,160 // **\$1,044 Early Bird**
General: \$1,450 // **\$1,305 Early Bird**

 **Bring your team!** Pay only \$870 tuition for each additional team member.



“Well-prepared and excellent presenter. You are doing a great job helping schools grow to benefit students. Thank you!”

Estuardo Guardia, *Spanish Teacher and Language Department Chair*
American School of Guatemala, Guatemala



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, ISM will credit the tuition you paid toward another similarly priced workshop or refund your tuition up to 100%.



This session was simply outstanding. The content was well organized and the presentation style you use is easy to understand. I love how [the leader] uses humor to keep it very light.

Nan Wodarz, *Interim Head of School*
Linden Hall School for Girls, PA

The leader is an exceptional presenter! I learned so much invaluable information during the workshop that I know will benefit me throughout my entire career!

Kaitlyn Calvez, *Math Department Chair*
The Briarwood School, TX

Thank you for a wonderful workshop. It was exactly what it promised to be and then went above and beyond in providing real training for transformative school initiatives.

Denise Labieniec
Director of Studies, The Winsor School, MA

Strengthen your **competitive position** with mission-driven strategies from ISM

Every school should have a strategic academic plan, but it requires bandwidth, oversight, and buy-in from faculty and students.

Let us help you create a new strategic academic approach and identify priorities for change—such as schedule, curriculum, instructional approach, and professional growth—to ensure the best mission delivery and marketplace stance.

- ✔ Virtual and In-Person Consultations
- ✔ Individualized Support
- ✔ Custom Planning

WHAT STRATEGIC ACADEMIC PLANNING MEANS FOR YOUR SCHOOL

Ensures a **systemic approach** to your school's personalized mission delivery.

Provides that academic resources are part of a **forward-thinking framework** that's included in the strategic planning and strategic financial planning process.

Enables your school to **adapt** its programs to meet the needs of students in a **fast-changing environment**.

Creates an **innovative academic system** that can continually reinvent itself.

Aligns the school's faculty and staff with the **best interests of each student**.

Deliver your mission with excellence by leaning on our 45+ years of unparalleled research, data, and expertise in private schools.

Learn more at go.isminc.com/sap



Everything you need to build a stellar international student program

Whether your K–12 private school wants to create a thriving international student program or strengthen your established offerings, there will always be obstacles. Build a successful international student program with **ISM's International Circle** and **International Student Accident and Sickness Insurance**.

RESOURCES



International Circle—Content, Community, and Coaching

Join the only online educational community for K–12 private school international student program managers. Overcome roadblocks when it comes to homestay matching, student orientations, strategic staffing, visa approval processes, and more.

- ✓ Explore our research-backed content and resources such as articles, checklists, and downloadable templates.
- ✓ Access exclusive webinars led by experts in the field, covering compliance issues and programmatic guidance.
- ✓ Interact with other school leaders and ISM Consultants on discussion boards.
- ✓ Get answers to your questions in live coaching sessions.

PROTECTION



Comprehensive Health Insurance Solutions for International Students

Enjoy the combined knowledge and support of ISM and GeoBlue® to protect the health and well-being of your international students. Part of the Blue Cross Blue Shield family, GeoBlue is a trusted leader in the education market, offering thoughtful plan designs and exceptional service, ensuring your students have the protection they deserve. With GeoBlue, you get:

- ✓ Flexible coverage in every U.S. community and 190 countries around the world.
- ✓ Quick and convenient access to a variety of tools and resources with the GeoBlue mobile app.
- ✓ 24/7/365 multilingual support when you or your students need help the most.
- ✓ Medical assistance and support services to help when the unthinkable happens.

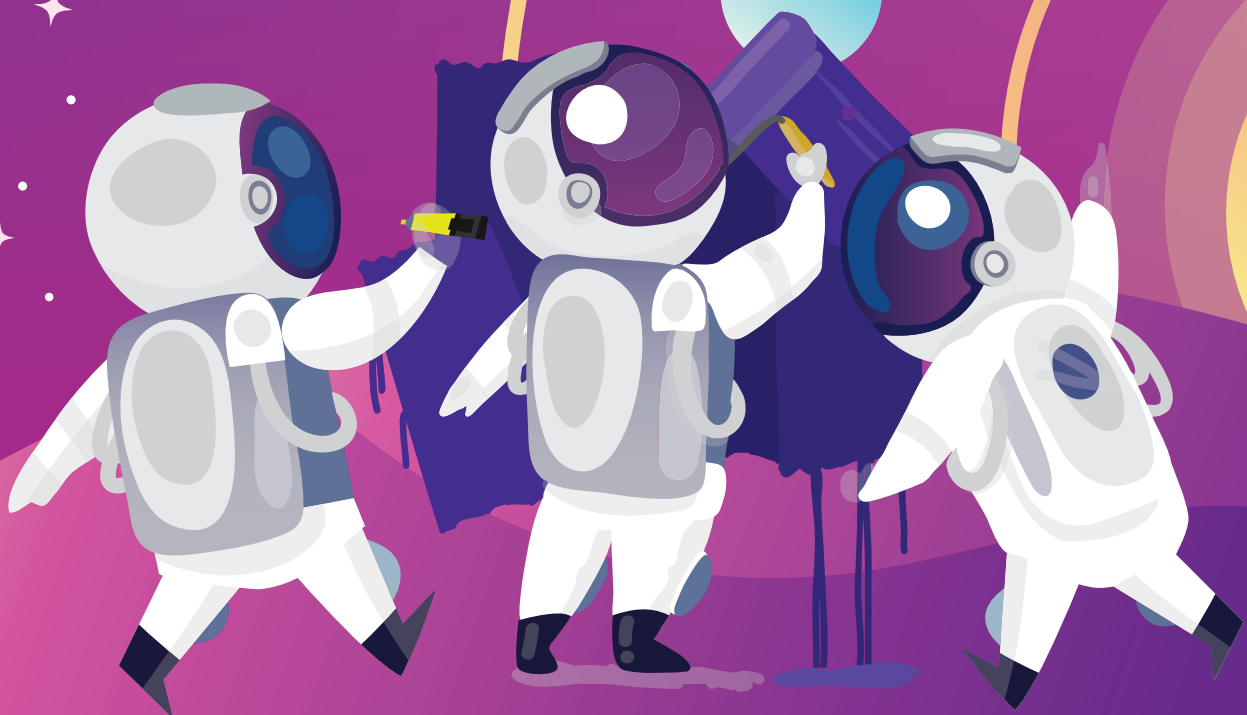
GeoBlue is the trade name of Worldwide Insurance Services, LLC (Worldwide Services Insurance Agency, LLC in California and New York), an independent licensee of the Blue Cross and Blue Shield Association.

Get started: email international@isminc.com

advancement academy

IN PERSON EVENT

July 18–22, 2022



advancement academy

JULY 18-22, 2022 • RANCHO BERNARDO INN, SAN DIEGO, CA



Extraordinary Results for your school

The 11th Annual Advancement Academy is a hands-on, weeklong professional development event like none other for private school leaders. Whether you choose to attend the Academy alone or with your school team, you'll leave with the plan and tools to make a difference the minute you return to campus in the fall.

Join hundreds of schools that have surpassed their enrollment management, development, and marketing goals after attending ISM's Advancement Academy!

- ★ **36+ SESSIONS TO CHOOSE FROM**
- ★ **MENTORSHIP**
- ★ **ACTION PLANNING**
- ★ **NETWORKING**
- ★ **FOR ADMISSION/ENROLLMENT, DEVELOPMENT, MARKETING COMMUNICATIONS PROFESSIONALS, SCHOOL HEADS**
- ★ **40 IACP CREDITS** isminc.com/iacp

Advancement Academy Faculty and Mentors

ISM is privileged to bring together distinguished members of the private-independent school advancement community as faculty members and mentors for ISM's learning programs. 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 by their peers as exemplary members of the profession.

Penny Abrahams, IAP-L
*ISM Consultant,
Advancement Academy
Convener*

Greg Abel, IAP-L
*Director of Marketing and
Communications,
The Providence Country Day
School, RI*

Casey Bell, Ed.D., IAP-L
*Director of Enrollment
Management,
All Saints' Episcopal School, TX*

Harold Brown, IAP-L
*Director of Advancement,
Cranbrook Schools, MI*

Michael Christopher, IAP-L
ISM Consultant

Phil C. Higginson, IAP-L
*Associate Head of School
for Philanthropy,
Ravenscroft School, NC*

Clint Losch
*Director of Business
Development,
Powered by ISM (PBI)*

Robert Marley Jr.
ISM Multimedia Specialist

L.J. Mitchell, IAP-L
*Director of Development,
The Calhoun School, NY*

Steve Salvo, IAP-L, AEMP
*Head of School,
St. Mary's Episcopal Day
School, FL*

**Isabel Sankaran-Wee, CFRE,
IAP-L**
*Director of Advancement,
Stratford Hall, BC, Canada*

Herbert P. Soles, CFRE, IAP-L
ISM Consultant

Gigi Tysinger, IAP-L
*Director of Advancement
Services & The Academy Fund,
Norfolk Academy, VA*

Scott Wilson
ISM Platinum Executive Coach

FEATURED SESSION SPEAKER

Mike Gwaltney
*ISM Consultant & Director of
Online Learning*



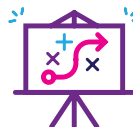
Achieve an Unparalleled Focus Through ISM's Proprietary Assessment

Discover your school's strengths and challenges so you know where to focus your efforts. You'll begin your week at the Academy by taking our advancement assessment—a tool that is backed by the principles we have established through our 45+ years of experience.



Rely on Your Mentor's Expert Advice and Insight

Your mentor is there to guide you every step of the way. All Academy faculty are proven leaders—many work in private schools today. Your mentor will help you select sessions, work toward goals, and build your action plan.



Create a Clear, Unified Strategy Across Departments

Attend with your team to collaborate on a unified, aligned approach. The Academy is a wonderful opportunity for teams to strategize for the year ahead. You'll join different sessions to discover new approaches, and regroup with your colleagues to share what you've learned.



Return Home With a Plan for Success

You'll walk away with a tactical, mission-driven action plan to achieve your goals—with the confidence to know you'll make an impact when you return to campus. Hundreds of school leaders have crafted approaches to surpass their enrollment management, development, and marketing goals after attending ISM's Advancement Academy.

TUITION

Platinum members
\$2,982 (\$2,782 Early Bird)

Gold members
\$3,408 (\$3,208 Early Bird)

General
\$4,260 (\$4,060 Early Bird)

Team Pricing
\$2,862 (second person +)

Tuition includes workshop materials, breakfasts, breaks, two lunches, social hours, and one dinner. Travel and accommodations are not included.

DETAILS

The Academy takes place over five days. Each day will include interactive learning sessions, mentor meetings including small group breakouts, and time for reflection and action planning. You'll also attend meals and networking receptions with your peers and the Advancement Academy faculty.

HOTEL: RANCHO BERNARDO INN

17550 Bernardo Oaks Dr., San Diego, California, 92128
General: 844-226-8262 // Hotel Reservation: 844-226-8262 (Ask for ISM Academy Group Rate)

Check go.isminc.com/academy2022 for our room block rates.

ISM GUARANTEE

If you are not satisfied with your workshop, ISM will credit the tuition you paid toward another similarly priced workshop or refund your tuition up to 100%.



International Advancement Certification Program (IACP) Credits

Independent School Management 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).

REGISTER TODAY!

go.isminc.com/academy2022

302-656-4944

schoolsuccess@isminc.com



		Advancement	Development		Enrollment Management	Mkting & Com
MON • 7/18	12:30 p.m	Opening Session				
	1:30–2:45 p.m.	Mentor Groups				
	2:45–3:00 p.m.	Break				
	3:00–4:30 p.m.	The Inspiring Roles of Your Board and Head in Advancement	Donor Cycle Part I: Identify, Engage, and Evaluate	Developing Metrics That Support a Robust Alumni Program	Impacting Student Experience Through the Enrollment Manager’s Seat	Harness the Power of Word-of-Mouth Marketing
	4:30–5:00 p.m.	Break				
	5:00–6:00 p.m.	Reception				
	6:00 p.m.	Dinner With Your Mentor Group				
	TUES • 7/19	7:30–8:30 a.m.	Breakfast			
8:30–9:15 a.m.		Featured Session: Action Plan & Presentation Overview				
9:15–10:45 a.m.		Keys to Building a Culturally Competent Team	Donor Cycle Part II: Solicit, Recognize, Steward		Turning Teacher Tension Into Faculty Friendships	Fill Your Funnel: Inbound Marketing Fundamentals
10:45–11:00 a.m.		Break				
11:00 a.m.–12:00 p.m.		Mentor Groups				
12:00–1:00 p.m.		Lunch and Heads Luncheon				
1:00–2:30 p.m.		A Visionary Approach to Planning for Your School	Leadership Giving and Your Annual Fund		The New Admission Office: Lessons Learned	One Size Doesn’t Fit All: Segmented Messaging
2:30–2:45 p.m.		Break				
2:45–4:15 p.m.		Build an Effective Volunteer Corps	Building Endowment Through Major and Planned Gifts		Develop a Mission-Centered Enrollment Management Program	Elevate Your Social Media Strategy
4:15–5:15 p.m.		Mentor Groups				
5:15–5:30 p.m.		Break				
5:30 p.m.		Reception				
WED • 7/20	7:30–8:30 a.m.	Breakfast				
	8:30–9:15 a.m.	Featured Session: Advancement Film Festival				
	9:15 a.m.–10:45 p.m.	A Shared Approach to Onboarding New Families	Create Fundraising Harmony With the Development Quartet	Embarking on the Annual Fund Adventure	The Key to Full: Retaining the Families You Have	How to Build a Culture of Customer Service
	10:45–11:00 a.m.	Break				
	11:00 –12:15 p.m.	Popcorn Topics: Discussion and Networking Opportunities				
	Afternoon	Free Time to Relax and Enjoy San Diego!				
THURS • 7/21	7:30–8:30 a.m.	Breakfast				
	8:30–9:15 a.m.	Featured Session: Diversifying Advancement Efforts				
	9:15–10:45 a.m.	Creating Action Plans in the Advancement Quadrant	The Magic Power of Trustees in a Campaign	Opening Doors Through Prospect Research	A Culture of More: How to Manage Parent Expectations	Core Conversion Pathways for Websites
	10:45–11:00 a.m.	Break				
	11:00 a.m.–12:00 p.m.	Mentor Groups				
	12:00–1:00 p.m.	Lunch and Heads Luncheon				
	1:00–2:30 p.m.	Creating a Shopping List for Your Major Prospects	Donor Retention: Love the Ones You’re With!		Admission: What Really Matters to Your Board	Stand Out in the Crowd: Differentiate Your School Through Marketing
	2:30–2:45 p.m.	Break				
	2:45–4:15 p.m.	Enhance Your Relationships With International Families	Ready, Set, Go! The Phases of a Capital Campaign	Storytelling for Development	Thinking Strategically About Tuition and Financial Aid	Video Everyone Can Do (Yes, You!)
	4:15–5:15 p.m.	Mentor Groups				
	5:15–5:30 p.m.	Break				
	5:30 p.m.	Reception				
FRI • 7/22	7:30–8:30 a.m.	Breakfast				
	8:30–9:30 a.m.	Participants Present Their Action Plans				
	9:30–9:45 a.m.	Break				
	9:45–11:00 a.m.	Popcorn Topics: Discussion and Networking Opportunities				
	11:00–11:45 a.m.	Closing Session: Being a Leader				

“

Attending the Academy completely changed my career.

I took courses in every area of advancement over the five days, and every faculty member was exemplary. I went from feeling skeptical and scared to being much more comfortable. It really gave us a beautiful understanding of how the pieces of advancement and my team could work together.”

Joan Siefkes Moore, *Former Director of Advancement* | Wichita Collegiate School, KS

I came here with our Director of Communications and Director of Admissions—it was a phenomenal experience.

So many times you go to conferences and it's exhausting—presentation after presentation. **The Advancement Academy creates space in the schedule for people to come together [and] reflect on what they have done.** This not only allows our team to process what's happening, but also models good teaching. It's what we want to do in our own schools—create opportunities for reflection on any type of learning experience.”

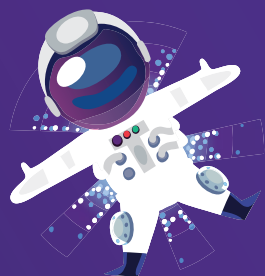
John McWilliams, *Head of School* | The Montgomery Academy, AL

The investment in the Advancement Academy is so worth it.

The mentors here and the ISM team here are dedicated to your professional growth and the success of your school. Not only are we in workshops and taking in all that information, but we have one-on-one or two-on-one mentorship programs—learning from great mentors in a smaller setting, really focus[ing] on the things that you need.

I can't say enough good things about the work that is being done here. I know I'm going to get on that plane tomorrow—I might take a little nap because it's been a lot of work—but every second has been worth it.”

Jackie Grosser, *Director of Upper School Admissions* | The Leffell School, NY





the SOURCE

Trends, Advice & Insight for Private-Independent Schools

Get the answers to your most pressing questions and the latest private school trends, news, theory, and guidance—delivered directly to your inbox.

Join more than 30,000 private-independent school administrators and subscribe to *The Source*. Every issue of *The Source* has relevant, position-specific content to help you be more effective in your role. We want you to succeed—and we're providing the tools to help you do so.

Topics have included:

FOR SCHOOL HEADS

- Seven School Leadership Skills Every School Head Needs—Before Day One
- Your Questions Answered: How to Start Next Year Off Right as a New School Head
- Leave the Stress Behind to Make Your Next Hire a Success

FOR BUSINESS OFFICERS

- Chaos Is So 2020—Planning With Intention Is What's in Style
- If Spreadsheets and Budgets Leave You Frustrated ... This One's for You
- Ten Ways to Reduce the Risk of a Cyberattack on Your School

FOR ACADEMIC LEADERS

- Six Questions to Ask About Student Assessment
- How to Face Diversity, Equity, and Inclusion Challenges With Commitment
- Student Advisement: What Works, What Doesn't, and How to Make It Better

FOR ADMISSION AND MARKETING LEADERS

- Five Ways to Make a Big Deal About Student Acceptances at Your School
- Seven Benefits of the Net Promoter Score® and How to Use It to Assess Student Satisfaction
- How to Analyze Your Website Like a Marketing Pro and Increase Admission Fast

FOR FUNDRAISING LEADERS

- Seven Actions You Can Take Now for Annual Giving
- Beyond the Checkbook: Successful Development Planning for Your School
- Three Steps to Building a Strong Foundation for Your Alumni Association

Sign up for *The Source* at go.isminc.com/your-source



Join an Exclusive Advisory Board for School Heads

Get the most out of your membership through proven strategies, dedicated mentorship, and an unparalleled group of School Head peers.



TRANSFORMATIVE LEARNING

- ✓ Learn from ISM Consultants and other industry experts
- ✓ Gain new strategies and tactics
- ✓ Understand the latest trends impacting schools



EXECUTIVE MENTORING

- ✓ Receive individualized, personalized guidance
- ✓ Turn to an expert to help solve your challenges
- ✓ Rely on an Executive Consultant or Coach for unbiased advice and support



A LEADERSHIP NETWORK OF PEERS

- ✓ Get feedback from noncompeting Heads who understand your position
- ✓ Find out what's working for others
- ✓ Engage in affinity groups based on pedagogy and geography

Transformation starts here.
Email schoolsuccess@isminc.com about
becoming a Platinum member!



Leader bios

Greg Abel, IAP-L, *ISM Advancement Academy Faculty & Director of Marketing and Communications* at The Providence Country Day School, RI

Greg provides expertise in the areas of school branding and storytelling to engage audiences and cause impact across communities. Since 2015, Greg has served as an instructor and mentor at our Advancement Academy, helping advancement professionals perfect their internal and external communication strategies. In his current role, Greg oversees school's branding and messaging initiatives while managing external marketing and internal communications.

Penny Abrahams, IAP-L, *ISM Consultant & Advancement Academy Convener*

Penny joined ISM in 2010, after working in private-independent schools for more than 13 years and serving various other nonprofits for an additional seven years. Her areas of expertise and passion include conducting assessments for enrollment management and marketing communications programs, completing volunteer group audits, building and implementing strategic plans, and developing and executing digital and inbound marketing strategies. She also co-leads ISM's Digital Solutions team.

Barbara Beachley, *ISM Consultant & Executive Director of Organizational Learning and Development*

Barbara joined ISM in 2011 after working in the field of education since 1996. Her areas of expertise include employee development and culture, organizational systems, academic leadership, faculty evaluation, student-centered and brain-based pedagogies, mission identity, survey design, and data analysis. Barbara provides consultations, facilitates workshops, writes for *Ideas & Perspectives*, co-authors books, and conducts webinars in her areas of expertise.

Casey Bell, Ed.D., IAP-L, *ISM Summer Institute Faculty, Advancement Academy Faculty, & Director of Enrollment Management* at All Saints' Episcopal School, TX

Casey provides insight on building admission programs that attract and retain a diverse, multinational student population, directing annual fund and major gifts fundraising programs, and creating marketing communications programs that align with mission and support admission and development efforts. Casey leads her team with curiosity and intent, overseeing domestic and international admission.

Kelly Bird, *ISM Summer Institute Faculty & Director, Early Learning Center* at Renbrook School, CT

Kelly oversees the social, emotional, and cognitive well-being and growth of 70 students in her current role. She provides support for other school leaders as a result of coaching her own faculty through collaborative goal setting, observation, and feedback. Previously, she served as a Coach for Teaching Apprentices in the Urban Teaching Apprenticeship Program at the University of Pennsylvania. She also has experience as a teacher and Division Director.

Toni Boyd, *ISM Adjunct Consultant & Vice President for Finance and Operations* at The Westminster Schools, GA

Toni is an adjunct ISM Consultant, specializing in Business Office operations, accounting, and finance. She has consulted extensively with independent schools across the country and internationally on business office operations, not-for-profit accounting, and institutional governance. Toni has been with Westminster since 2017, having previously served in a similar position at Athens Academy for 17 years.

Harold Brown, IAP-L, *ISM Advancement Academy Faculty & Director of Advancement* at Cranbrook Schools, MI

A strategic and focused leader, Harold enjoys assembling high-performance development teams and leading them to meet their organizational goals. Harold's expertise includes extensive knowledge of all aspects of fundraising, including major and planned giving gifts from alumni, parents, and friends. Harold acts as an instructor and mentor to help advancement professionals create systems and metrics for their development initiatives.

Ira Childress, *ISM Summer Institute Faculty & Assistant Athletic Director of Player Relations* at LSU Football at Louisiana State University, LA

With nearly 20 years of experience in administration at the high school and college levels, Ira has helped create diverse and inclusive environments for numerous departments and teams. In his roles as an Athletic Director, education administrator, and the former Assistant Director for Diversity & Inclusion at the NCAA National Office, Ira has used his passion for connecting people toward one common goal—the pursuit of excellence.

Michael Christopher, IAP-L, *ISM Consultant*

Michael has served schools with ISM since 2002. A charter member of the ISM Advancement Academy and long-time member of the ISM Summer Institute faculty,

Michael has performed assessments in the areas of development, marketing, and enrollment. He has also advised Boards on strategic planning, financial planning, Board operations, governance, and development, and has worked extensively with schools to create meaningful identity and vision statements that inform planning, enrollment management, and development.

Jessica Clark, *ISM Summer Institute Faculty & Interim Head of the Upper School* at National Cathedral School

Jessica shares her experience as a Head of Upper School and Dean of Students, teacher, sports coach, and dorm parent. In her current role, Jessica works with students in grades 9–12. She also spearheads the work of the Center for Ethical Leadership and Service, a role that serves students in grades 4–12, as well as the school's faculty and staff.

Jay Dean, *ISM Summer Institute Faculty & Middle School Director* at The Blake School, MN

Jay Dean earned his M.S. in School Counseling from Loyola Marymount University and his B.S. in TV, Radio and Film Production from Syracuse University. He joined Blake as Assistant Middle School Director and English Teacher in 2011. Prior to joining Blake, he worked as a Humanities teacher and Academic Dean at Crossroads School for Arts and Sciences in Santa Monica, California, for nine years.

Mike Gwaltney, *ISM Consultant & Director of Online Learning*

Mike has been a teacher, coach, department chair, technology specialist, curriculum developer and coordinator, division head, high school principal, and Assistant Head of School over his 30-year private-independent school career. He has been affiliated with ISM as a Summer Institute faculty member since 2014, and as a full-time ISM Consultant since June 2020. As a full-time Consultant, Mike works with schools on all areas of academic programming.

Roxanne S. Higgins, *ISM President, Director of Consultants, & Senior Executive Consultant*

As ISM's President and Senior Executive Consultant, Roxanne provides scheduling consulting services for schools of all types, sizes, and grade levels; facilitates workshops; and helps develop content for articles in *Ideas & Perspectives*, ISM's advisory publication. Roxanne has worked onsite with more than 400 schools in North America, South America, Asia, and Europe.

Philip C. Higginson, IAP-L, *ISM Advancement Academy Faculty & Associate Head of School for Philanthropy* at Ravenscroft School, NC

Phil has worked with schools to develop their strategic vision, establish financial priorities, and organize campaigns to fund their identified strategic initiatives. His expertise includes extensive knowledge of endowment and planned giving. He teaches workshops related to alignment of advancement objectives, institutional strategic planning, management of major gifts programs, roles and responsibilities of the Development/ Advancement Committee, and effective use of advancement data.

Javaid Khan, *ISM Summer Institute Faculty & Head of Middle Division* at Horace Mann School, NY

Javaid combines his extensive classroom experience, diversity work, and leadership background to help middle school leaders refine their pedagogical methods. He puts students at the center of his work and views education with a flexibility that gives leaders the tools to meet their missions. Javaid also sits on his school's Administrative Council, plays a prominent role in admission, and supports faculty and staff in their work with students, families, and colleagues.

Andy King, *ISM Summer Institute Faculty & Upper School Director* at Hackley School, NY

Andy has been an Upper School Director for nearly 10 years. He is an expert in developing an effective team of Deans, Department Chairs, Athletic Directors, and other staff to help deliver his school's mission with excellence. Andy works directly with students, evaluates teachers, manages hiring and orienting new faculty, oversees parent communications, designs curriculum, manages disciplinary issues with students, and resolves personnel matters with faculty and staff.

Liz Layne, *ISM Summer Institute Faculty & Director of the Head of School Office and Board Relations* at Ethical Culture Fieldston School, NY

Liz Layne is a seasoned administrative professional, serving the New York City independent school community for over 20 years. Liz has been an executive partner to Heads of School and Boards during her extensive career. She has also supported senior-level administrators in fundraising, finance, operations, and human resources. Liz is passionate about creating professional development opportunities for administrative support staff.

Clint Losch, ISM Advancement Academy Faculty & Director of Business Development, Powered by ISM (PBI)

Clint's background is in the areas of content marketing, SEO, social media marketing, marketing automation, and marketing operations with private-independent schools. Clint leads ISM workshops and webinars on inbound marketing, and is an Advancement Academy faculty member. He co-leads ISM's Digital Solutions team, which provides done-for-you inbound marketing content and advertising services. He also provides one-on-one services.

Robert Marley, Jr. ISM Advancement Academy Faculty & Multimedia Specialist

Bob has over 18 years of experience in multimedia, video production, print and online publications, webinar production, and workshop and conference presentations. Bob's responsibilities at ISM include producing video content, designing ISM publications, creating tools for advisory services, and leading sessions at ISM's Advancement Academy.

Michelle Merson, ISM Summer Institute Faculty & Head of Middle School at Crossroads School for Arts & Sciences, CA

Michelle uses her experience as a Middle School Head, Assistant Head, and Dean to help fellow school leaders develop strategies to support middle school teachers and students. She shows middle school leaders how to generate and enhance programs and relationships that enable teachers to do their best work with students. Michelle has been with Crossroads for over 23 years, and has served as a Dean of Students and the Assistant Head of the Middle School.

L.J. Mitchell, IAP-L, ISM Summer Institute Faculty, Advancement Academy Faculty, & Director of Development at The Calhoun School, NY

L.J. helps private-independent school development leaders strengthen their strategies in building an annual fund and hosting special events fundraising. He has 17 years of fundraising experience with record-setting results in annual giving, campaigns (capital and endowment), and events. L.J. has served as an administrator in private schools since 2005. He has presented at conferences for CASE-NAIS (2015, 2014-Stellar Speaker), NYSAIS, and The Episcopal Church of the United States.

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

Terry has been with ISM since 2002. He has served more than 200 schools onsite, with many school leaders returning for additional advice year after year. He also acts as a senior writer for ISM's publications, including *Ideas & Perspectives*; created the ISM FAST program (ISM's cutting-edge financial aid tool); speaks at various conferences, including NBOA,

NYSAIS, CAIS, FISBO, and AISNE; and leads ISM workshops and webinars.

Josh Nelson, Ph.D., ISM Consultant & Director of Faculty and Curriculum

Josh consults with client schools on STEM education, curriculum and instruction, and scheduling. He was instrumental in the ISM design for Engaging Students in an Extended Period. He is also ISM's Director of Faculty and Curriculum, helping shape our professional development initiatives. Josh most recently served as the Chief Academic Officer for 12 years at St. Andrew's Episcopal School in Austin, Texas.

Mary Yorke Oates, ISM Summer Institute Faculty & Director of Admissions at Charlotte Latin School, NC

Mary Yorke supports school leaders in the areas of admission, development, and marketing communications. She is especially interested in tactical and strategic planning, revamping systems, and highlighting the importance and value of serving others and leading high-functioning teams. At Charlotte Latin, Mary Yorke oversees all aspects of admission, including recruitment, retention, marketing, assessment, selective class placement, and student and faculty admission engagement.

Mary Jo Pruitt, ISM Summer Institute Faculty & Director of Athletics at Castilleja School, CA

Mary Jo provides expertise in the daily operations of private school athletic teams, including optimizing processes, encouraging teamwork, and creating a positive atmosphere. She oversees the daily operations of the Upper and Middle School athletic teams, which includes 11 upper school sports and 10 middle school sports.

Kurt Ruch, ISM Summer Institute Faculty & Athletic Director at George School, PA

Throughout his 25 years of working in physical education, Kurt has seen the positive role athletic programs play in student growth and development. Since 2019, Kurt has been a force in helping George School lead and achieve in athletics. In his role with ISM, he helps school coaches and administrators support student athletic programs and ensure their continued viability.

Steve Salvo, IAP-L, AEMP, ISM Advancement Academy Faculty & Head of School at St. Mary's Episcopal Day School, FL

Steve is an advancement professional with management experience in independent school admission, development, marketing, and communications. Prior to his Headship, Steve served as Assistant Head of School at Trinity Episcopal School in New Orleans. There, he oversaw various aspects of the student experience, including acting as Director of Enrollment Management; led all recruitment

and re-recruitment functions; and served as Director of the school's \$700,000+ tuition assistance program.

Isabel Sankaran-Wee, IAP-L, CFRE, ISM Advancement Academy Faculty & Director of Advancement at Stratford Hall, BC, Canada

Isabel shares her expertise in fundraising, public relations, marketing and communications, admission, and community relations. Isabel currently oversees development, admission, and marketing at Stratford Hall in Vancouver, British Columbia, Canada. She is part of the Executive Leadership Team and has management responsibilities for developing and sustaining long-term community growth for her school.

Shannan Schuster, Ed.D., ISM Consultant

Shannan joined ISM in 2020, following 26 years in public, parochial, and private-independent schools. Shannan shares her expertise in school management, hiring, leadership, support services, scheduling, and Board-Head collaboration. Shannan previously served as Head of School at The Swain School, Pennsylvania. Before becoming a Head of School, Shannan was the Assistant Head of School at Friends' Central School, Pennsylvania, and Dean of Faculty at Flint Hill School, Virginia.

Bryan Smyth, Ph.D., ISM Senior Consultant & Director of Research

Bryan joined ISM as a Consultant in 2013, following 13 years in independent school administration. Bryan conducts onsite scheduling consultations, having had extensive experience creating and implementing unique daily schedules and annual calendars for both boarding and day schools. In addition, he helps schools analyze their strategic operations and leads webinars and workshops on scheduling, student-centered policies, faculty growth and evaluation, finance, and social-emotional well-being. He also co-facilitates ISM's yearly Heads Retreat and writes for *Ideas & Perspectives*.

Herbert P. Soles, CFRE, IAP-L, ISM Consultant

Herb provides consulting services in the areas of development and fundraising, with expertise including extensive knowledge of endowment and planned giving as a way to increase donors' capacity to give at leadership levels. He has been affiliated with ISM as a faculty member for over 30 years, and joined as a full-time ISM consultant in 2016.

Matthew Stuart, ISM Summer Institute Faculty & Head of School at The Caedmon School, NY

Matthew shares expertise in overseeing middle school operations, including hiring and evaluating faculty, mentoring and professional development, and facilitating curricula. Matthew has served as the Head at The Caedmon School since 2012. He is responsible

for ensuring all operations align with the school's mission and best serve its students. He has previously been a Head of Middle School at The Town School, New York; Director of the Middle School at National Cathedral School, DC; and a Department Head at The Spence School, NY.

Andrew Taylor, Ed.D., ISM Consultant

Andrew joined ISM in 2017, following 22 years in private-independent schools. Andrew shares his expertise in school management, professional growth and development, project-based learning, scheduling, and faculty evaluation. Andrew previously served as Head of Tower School, Massachusetts, where he was charged with rationalizing the operating budget, rightsizing the staffing model, and reconfiguring the school schedule to facilitate interdisciplinary instruction and project-based learning. Before that, he was Head of Lower School at St. Paul's Schools, Maryland.

Gigi Tysinger, IAP-L, ISM Advancement Academy Faculty & Director of Advancement Services & The Academy Fund at Norfolk Academy, VA

Gigi provides expertise in the areas of development policies, procedures, and data management. She shares her knowledge of the ways data-driven processes drive a school's overall fundraising strategies, encompassing gift accounting, gift reporting, research, prospect management, and donor stewardship. In her current role, Gigi coordinates and implements the processes that are essential elements of Norfolk Academy's overall fundraising strategy.

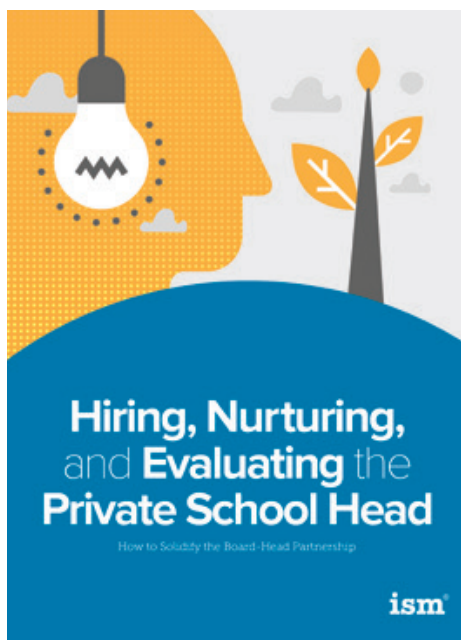
Scott Wilson, ISM Platinum Executive Coach

Scott, a 40-year leader in independent schools, joined ISM as a Platinum Executive Coach in summer 2021. Before that, he served as President and Headmaster of Baylor School, Tennessee, from 2009 to 2021. Scott understands the unique demands of independent school leadership and the skills necessary for navigating headship effectively—from strategic planning to the realities of working daily with the myriad constituencies of today's complex school world. Above all, he retains his passion for independent schools and the services they provide for their students.

Rebecca Zug, ISM Summer Institute Faculty & Head of Upper School at Wilmington Friends School, DE

Rebecca is an upper school leader who is passionate about helping administrators infuse their school's missions into their work. In her current role, Rebecca oversees hiring, faculty evaluation, and curriculum development. Under her leadership, Wilmington Friends School has deepened its professional development programming, increased collaborative service work, and joined an online school consortium.

Bookstore



PUBLICATION HIGHLIGHT

Hiring, Nurturing, and Evaluating the Private School Head: How to Solidify the Board-Head Partnership

As a member of the Board of Trustees at your private school, you have many duties. One of the most important is hiring, nurturing, and evaluating the School Head. The Head is the Board's only employee and is the person who implements the Board's strategic plan and strategic financial plan at the school's operational level. The School Head maintains the school's mission.

Boards can—and should—have excellent relationships with their Heads, and this book can help you solidify those relationships. At the core of the book's advice are three critical principles. For the best success, the Board must:

- treat the School Head in predictable and supportive ways;
- work reciprocally—that is, carry out its duties with the same assiduousness as is expected of the Head; and
- ensure that it operates strategically to allow the Head to act operationally.

We will delve into each of these and related areas.

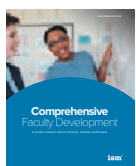
This book is based on the experiences of the Consultants of Independent School Management and:

- their consulting in private schools for more than four decades;
- articles published in ISM's management advisory letter *Ideas & Perspectives*; and
- materials used in ISM's workshops and presentations.

Throughout this book, we provide examples and samples to better explain the strategies and techniques discussed. These are intentionally generic so you can easily adapt them for your school's unique character and mission.

General: \$31.95

Comprehensive Faculty Development



Create a flourishing school culture that encourages teacher growth and innovation while providing predictability with a faculty evaluation system that holds faculty accountable with clear expectations for performance and professionalism.

Comprehensive Faculty Development: A Guide to Attract, Retain, Develop, Reward, and Inspire is your road map to separating these processes. Use it to reframe the very structure that surrounds growth and evaluation systems and transform the way your school supports its faculty.

General: \$61.95

COMPANION WORKBOOK



Teaching Excellence: A Research-Based Workbook for Teachers

Give teachers a hands-on tool to improve their leadership skills and further their careers. This self-directed analysis empowers faculty members to develop stronger teacher-student, teacher-teacher, and teacher-administrator relationships through guidance on predictability and support in the classroom, learned optimism, parent relations, and much more.

General: \$39.95



Your School's Child-Centered Summer Program: A Practical Guide for Summer Program Directors

As Summer Program Director, you likely realize that a summer program provides a valuable educational opportunity for children, as well as many other benefits. Parents of your current students appreciate having the program available for their children, and see it as a valuable service.

A summer program is an excellent source of auxiliary income that lets your school extend its mission beyond the school year to a greater number of students. It is a wonderful recruiting conduit as well, introducing your school to potential families and giving them a taste of what your school offers.

This book provides the guidance you need to streamline your program and provide a truly child-centered service that caters to families and their children.

General: \$39.95



Better Boards, Better Schools

Serving as a Trustee is a privilege that carries a substantial responsibility. Learn how to lead your school with a mission-driven, student-centered approach based on 45+ years of ISM research and experience working with private school Boards. Empower the strategic functions of your Board so your school thrives today and in the years to come.

General: \$31.95



Mission-Based Advisory: A Professional Development Manual

3rd Edition

Mission-Based Advisory leads faculty advisors through the most important issues they face when delivering high-quality, professional advisory programs. This research-driven, practical, and strategic approach to advisory significantly enhances each 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 other essential program tools you can photocopy and use immediately.

General: \$61.95



Facilities Planning and Maintenance for Private-Independent Schools

2nd Edition

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.

General: \$41.95



Tuition and Financial Aid: A Guide for Private Schools

Tuition and financial aid are not about money—they are about mission. How do you use these elements to sustain educational excellence over time? *Tuition and Financial Aid: A Guide for Private Schools* is the comprehensive resource guide to help you answer that critical question. This book provides solid research and proven techniques that will enable your school to remain viable and on mission. You will learn how to:

- handle the implications of tuition and financial aid during your strategic financial planning;
- set mission-based tuition specific to your school;
- deal with hidden inflation;
- announce tuition increases;
- orchestrate tuition payments;
- develop Board policy on financial aid; and
- budget for financial aid.

General: \$61.95



Scheduling Without Conflict for Private Schools

2nd Edition

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 Schools, a collection of key articles from ISM advisory letters, defines the critical components of a strong schedule.

General: \$61.95



Get Exclusive Access to Groundbreaking Research and Advice

Unlock the guidance school leaders have relied on since 1975

Join over 8,000 school leaders and gain access to 45+ years of research-backed strategies and tools to help your school thrive.

A key benefit for ISM members: our timely, research-based advisory letter, *I&P*. We cover critical topics facing private-independent schools. Receive this monthly guidance and insight for every leadership division of your school, delivered right to your mailbox or inbox.

Sign up for ISM's membership to receive *Ideas & Perspectives*.

Learn more at go.isminc.com/sign-up.



Constituent Satisfaction Survey Bundle

SINCE 2015:

1,200+ surveys completed
400+ schools supported
250,000+ constituents surveyed



Students thrive in predictable and supportive environments. Ensure you're providing the right resources to your community so your school functions at its highest capacity.

With ISM's **Constituent Satisfaction Survey Bundle**, you work with your school's vital constituents—students, parents, faculty, and staff—to understand their preferences and make data-driven decisions that will best serve them and your mission for years to come.

ISM offers the only private school survey instruments that measure predictability and support so you can propel your school forward.

“ We used ISM's survey services to better understand our school culture and parent satisfaction. When we conducted our first survey, we were able to compare our findings to ISM's extensive body of data to get a baseline of where we needed to improve. Our findings clearly indicated that culture matters deeply.”

William Carroll, *Head of School*, The Westfield School, GA

With ISM's Constituent Satisfaction Survey Bundle, you will:

Rely on a Team of Experts

Feel confident that you're asking the right questions.

Gain Honest Feedback

Surveys conducted by an independent third party help respondents feel more comfortable sharing their true feelings.

See Where You Stack Up

Receive benchmark data from students and faculty so you can compare where your school stands.

Define Next Steps

With data in hand, you can make informed decisions and craft an action plan designed to create real, lasting change on your campus and within your community.



Student Surveys

Measure the predictability and support students grades 5 and up feel they receive from their teachers, along with how they feel about your school's facilities, mission, and values.



Parent Surveys

Unveil what parents think you're doing well and where you can improve. This includes their perceived value based on tuition and their experiences through the admission process.



Employee Surveys

Gauge how happy teachers, staff, and administrators are in their roles. Teachers will also share how well they feel they support their students, along with their perception of administration's support.



Visit go.isminc.com/surveys22 to learn more.



ISM's Community Forum

Engage in a community where you can share insights, ask for advice, and discuss topics with fellow private school leaders.

It's a new way to build community—no matter where you are.

Join *What's Happening Now*, our open forum for:

- Administrative Assistants
- Admission Directors
- Athletic Directors
- Business Managers
- Deans
- Development Directors
- Division Heads
- Marketing Communications Directors
- Schedulers and Registrars
- Summer Program Directors

Plus—post open job opportunities and discuss ISM events, workshops, and courses. As the Community grows, we'll host special events and discussions.

Take advantage of this free community right now—let's start chatting!

Learn more by visiting go.isminc.com/forum or by scanning the QR code.



Event Information & Travel Guidelines

General Event Information

Event Registration

For individual registrations, you can sign up online at isminc.com/workshops or call us at 302-656-4944.

Submit your registration and payment early. We fill events on a first-come, first-served basis. Certain events, such as In-Person Summer Institute workshops, are limited to 24 participants. Sorry, we cannot accept registrations from consultants or representatives of associations or organizations.

Confirmation Policy

We will correspond with you through email as soon as your event is confirmed, no later than 20 business days before it begins. Occasionally, we may be forced to cancel an unconfirmed, scheduled event due to insufficient registration.

We ask that you do not make nonrefundable travel arrangements until you receive notice that your event is confirmed. (ISM will not be responsible for any change/cancellation charges assessed by your airline or travel agent.)

Tuition Payment Policy

In-Person Events

Tuition must be paid in full 5 business days before the start date of any event. An attendee with a balance due on the start date will be denied entrance to the event until the balance is paid in full.

Online Events

Tuition must be paid in full on the start date of the event. An attendee with a balance due on the start date will be denied entrance to the program until the balance is paid in full.

Cancellation Policy

Cancellation by ISM: Should ISM be forced to cancel an event due to insufficient enrollment, all registration fees will be fully refunded.

Cancellation by Participant: Cancellation requests must be made in writing to workshops@isminc.com.

- Cancellations received more than 10 business days prior to the start date of the event will be fully refunded.
- Cancellations received less than 10 business days prior to the start date of the event will not be refunded.
- Non-payment of tuition or no-show to an event does not constitute a cancellation. Full tuition will be due and payable.

If you can no longer attend and it is past the cancellation window, you may exercise two options to avoid penalty before the event start date.

- The school may substitute another employee.

General Travel Guidelines

Please make your travel arrangements so that your departure time is at least three hours after the conclusion of the event. This helps you take full advantage of learning and networking time—and allows for sufficient travel time to the airport.

When to Make Your Travel Arrangements

If you plan to fly, please do not make any nonrefundable airline reservations unless all of the following conditions are met.

- You have registered—and paid in full.
- You have received an acknowledgment that ISM received your registration.
- ISM has notified you that the event is confirmed to run—or you see that your event is now confirmed on the ISM website.

If you make nonrefundable travel arrangements before these conditions are met, ISM will not be responsible for any penalties or costs you incur should ISM be forced to cancel your event.

For information about your event's location arrangements, you can always visit isminc.com/workshops and go to your specific workshop or event. Click the LOCATION tab for reservations and details.

Advancement Academy 2022 Travel Guidelines

Flying to Advancement Academy in San Diego

Fly into the San Diego International Airport (SAN). The airport is approximately 35 minutes from the Rancho Bernardo Inn. Visit the Advancement Academy site and select the LOCATION tab for more information.

Hotel Reservations

Advancement Academy in San Diego

Rancho Bernardo Inn
17550 Bernardo Oaks Dr, San Diego, CA 92128
888-976-4417

A group hotel reservation rate of \$229+tax is available from July 18th to July 22nd for the Advancement Academy. The group rate will be extended for 3 days before and 3 days after these dates and is based on availability at the time of booking. Make your hotel reservations one of two ways:

Go to the Advancement Academy site at go.ismnc.com/academy2022. Under the LOCATION tab, click BOOK YOUR STAY.

Call 844-226-8262 and ask for the ISM Advancement Academy group rate.

The Rancho Bernardo Inn is pet-friendly, with limitations. Contact the hotel for details.

Summer Institute 2022 In-person Workshop Travel Guidelines

Flying to Summer Institute in Philadelphia

Fly into the Philadelphia International Airport (PHL). The airport is approximately 15–25 minutes from the Philadelphia Marriott Old City. Visit your workshop page and select the DESTINATION tab for more information.

Hotel Reservations

Summer Institute in Philadelphia

Philadelphia Marriott Old City
One Dock Street
Philadelphia, PA 19106
215-238-6000

A group hotel reservation rate of \$209+tax is available from June 26th to June 30th for Summer Institute workshops. The group rate will be extended for 3 days before and 3 days after these dates and is based on availability at the time of booking.

A group hotel reservation rate of \$199+tax is available from July 9th through July 16th for Summer Institute workshops. The group rate will be extended for 3 days before and 3 days after these dates and is based on availability at the time of booking.

Room nights outside of these dates are subject to availability.

Make your hotel reservations one of two ways:

Go to your workshop page on ismnc.com/si. Under the DESTINATION tab, click BOOK YOUR STAY.

Call 800-228-9290 and ask for the ISM Summer Institute group rate.

The Philadelphia Marriott Old City is pet-friendly with limitations. Contact the hotel for details.



ISM Insurance

An Integrated Approach to Complete, Mission-Centered Coverage

Large insurance companies simply don't offer policies that complement the cultures of private schools, the hours administrators dedicate to their school communities, and certainly not private school budgets. We strategically partner with all of our clients, enriching their cultures with mission-appropriate student and employee coverages. Let's work together to enhance your administrative practices with our renowned research and experience in the private school industry.

Offerings

Rest assured that we have the coverages you need with the best, customizable options.

Employee Benefits	Student Benefits	Directors & Officers	Risk Management
Group Health Dental Vision Health Care Consortiums Group Life Long/Short Term Disability Voluntary Products Life Accident Critical Illness	Domestic Student Benefits Student Accident Summer Camp/Summer School International Student Benefits International Student Accident & Sickness Study Abroad Traveler	Nonprofit D&O/Employment Practices Liability Private School Small Non-Profit Business <i>Policy Enhancement Options:</i> Sexual Misconduct Workplace Violence Internet Activity Fiduciary For-Profit D&O/Employment Practices Liability Stand-Alone Employment Practices Liability Religious Organizations D&O/Employment Practices Liability	Cyber Enterprise Foreign Property & Casualty General Liability Package Tuition Refund



If you have any questions regarding ISM's Insurance, please contact
302-656-4944 • insurance@isminc.com





POWERED BY ISM COMPANIES



Outsourced
School Solutions



Medical Advisory
Health & Wellness Organization



Athletic
Administrator Alliance

45+

years of experience in Private-Independent schools through research, consultations, surveys, events, and in-the-field experience

3,000+

registrants who have attended our Pandemic Briefings, brought to you now by the Medical Advisory Health & Wellness Organization (MAHWO)

1 Mission

to provide support and guidance to elevate your student experience

Introducing Powered by ISM

We're always striving to provide private school leaders like you with the resources and guidance you need. When the COVID-19 pandemic hit, we introduced Pandemic Briefings and with 3,000+ registrants, we knew we needed to continue to offer new resources and guidance to support your decisions.

That's why we created Powered by ISM—an umbrella company that offers new products and services to help you lead with confidence. Built on 45+ years of experience and your feedback, Powered by ISM companies give you access to the tangible, expert guidance you need exactly when you need it.

Deliver your mission with ISM's expertise. Get started now. Contact Clint Losch at **302-656-4944** or **clint@isminc.com**



MOVE AT THE SPEED OF BUSINESS WITH THESE POWERED BY ISM SERVICES

Outsourced School Solutions

OSS is focused on ensuring you accomplish your school's goals without breaking the bank. Get exactly the support you need without unnecessary overhead.

- **Head Search and Placement**—Find your K-12 school's next exceptional leader. Engage with us for Head and administrator search and placement, interim support, and strategic consulting.
- **Digital Marketing Solutions**—Benefit from done-for-you digital marketing services proven to keep your admission funnel full year-round and fill more seats.
- **Outsourced Business Office Services**—Enjoy better financial services at a lower price point. Services include outsourced bookkeeping and accounting, strategic advisory, and interim/fractional CFO.
- **HR Audit and Assessment**—Ensure the health of your human resources operations with trusted expertise at your fingertips. Take our Total HR Assessment to identify your strengths and weaknesses, or work with us to outsource part or all of your department.

Medical Advisory Health & Wellness Organization

It's time to be proactive about transforming student and faculty health at your school. Get direct access to medical professionals to give you the most up-to-date guidance and strategies to keep your students and employees safe and healthy.

- **Pandemic Briefings**—Since June 2020, the Pandemic Briefings have provided schools with the latest data and news to guide decisions throughout the school year. Our members can now continue to receive timely COVID-19 updates—specifically for private schools—from our team of medical experts.
- **Weekly Webinars & Research**—We address four main areas of health and wellness: student wellbeing, faculty wellbeing, medical policies and procedures, and substance abuse and trauma.
- **Community**—Our members-only community is made up of skilled and generous school leaders who are ready to share tips and advice, and answer your wellness-related questions.

Athletic Administrator Alliance

Athletic programs have a significant impact on student life, wellbeing, and school culture. A3 delivers ISM's research and insight to empower key athletic administrators to support their school's mission and positively impact student success, recruiting, fundraising, diversity, and much more.

ALL OTHER SERVICES AND PRODUCTS

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Independent School Management
2207 Concord Pike, #417, Wilmington, DE 19803

2022 learning events

SCHOOL-YEAR WORKSHOPS | SUMMER INSTITUTE | ADVANCEMENT ACADEMY

REGISTER TODAY!

📍 go.isminc.com/workshops

📞 302-656-4944

✉ schoolsuccess@isminc.com

Professional development that's
worth your investment.
Guaranteed.

