

NAES Principles of Good Practice for Governance in Episcopal Parish Schools

Introduction

Over nine hundred parishes and cathedrals in the Episcopal Church have a school as part of their ministry. Parish day schools are a vital dimension of the Episcopal Church's ministry of outreach, and each year a growing number of children are nurtured in mind, body, and spirit in our parish schools.

The governance of day schools in the parish setting is a challenge because "the levels of communication and accountability required by the complex nature of Episcopal schools' relationships with other Church entities call for special expertise and leadership development." The complexity of governance in the parish day school model can include more than twenty-three groups of stakeholders, which adds up to thousands of people with intersecting interests who are part of the school setting. It is no wonder that wise vestries, rectors, school Trustees, and heads of school seek clarification regarding their shared roles and responsibilities.

In an effort to assist leaders of both church and school in effective governance in the parish day school setting, schools where thousands of children and families grow and learn each year, NAES has developed this set of *Principles of Good Practice for Governance in Episcopal Parish Schools*. The *Principles* are intended to:

- Support the professional and lay people of both the church and school as they seek to be responsible, caring leaders and partners in the governance of the day school.
- Assist vestries, rectors, school Trustee members, and heads in understanding their roles and responsibilities, and the boundaries that define each particular role in the governance process of a school.
- Guide discussion and processes as leaders strive to create trusting, collegial, and mutually fulfilling relationships in the parish school setting.
- On a practical level, NAES anticipates that the Principles will be brought to bear on important aspects of our schools' institutional life, particularly:
 - church-school relations;
 - vestry, Trustee, and staff orientations and the understanding of the various roles and responsibilities;
 - parent orientation processes;
 - strategic and annual planning processes;
 - leadership transition processes;
 - regular self-study of governance processes as part of an academic accreditation self-study;
 - vestry, Trustee, rector and head evaluation processes;
 - marketing to the community the unique church/school partnership found in parish schools.

The National Association of Episcopal Schools series of *Principles of Good Practice* has been developed

- to share best practices found in Episcopal Schools,
- to delineate the important issues that are common to Episcopal schools, and

- to offer guidance as each school develops and reviews policies and practices.

Because each Episcopal school is unique, a “one size fits all” formula does not apply to the majority of Episcopal Schools. However, NAES seeks continually to promote effective governance in Episcopal schools and invites school and church leaders to use the Principles as a tool to enlighten and assist you in planning, modeling, and encouraging additional reflection about governance practices.

Herewith are Principles of Good Practice for Governance in Episcopal Parish Schools.

By-Laws

- The school’s by-laws clearly articulate the mission of the school, the relationship between the church and school, and the role of the vestry and the Trustee.
- The by-laws define the school as an extension of the mission of the parish, guided by a Trustee with clear authority for developing policies and providing oversight. The Trustee has the responsibility for communicating frequently and clearly with the vestry, the governing body of the parish.
- A joint Trustee/vestry committee periodically reviews the by-laws. Recommendations for changes are brought to both the Trustee and vestry for discussion and consideration, with final ratification by the Trustee.

Relationship Between the Church and School

- The parish views the school as a significant outreach program to the community.
- School Trustee membership includes sufficient representation of parishioners to ensure a strong church presence and to sustain the school’s continuing Episcopal identity.
- **Church and school leaders, both professional and volunteer, exercise their ministry in a collegial partnership.**
- Responsibility for the Episcopal identity of the school rests upon the shoulders of every member of the leadership team: vestry, rector, Trustee, head, chaplain, faculty, and staff.

Roles and Responsibilities: Vestry and Trustee, Rector and Head

The Vestry and Trustee

- The vestry has ultimate responsibility that the school is managed wisely and soundly. Vestry members understand and support the need to delegate to the school Trustee the authority to provide oversight and set policies for the school.
- The Trustee works to ensure the future of the school and its continuing Episcopal identity.
- The vestry is knowledgeable about the history, philosophy, by-laws, and strategic priorities of the school.
- The Trustee is required to have an understanding and appreciation of the sponsoring church and its history, philosophy, and strategic priorities.
- Vestry members stay informed through regular reports from the school.

- The Trustee ensures appropriate reporting procedures and promotes open communication between the church and school.
- Comprehensive orientations of new vestry members include information about the school's relationships with the parish, its history, and annual and strategic school goals.
- The orientation of new Trustee members includes information about the school's relationship with the parish, its shared history, and annual and strategic parish goals.
- The vestry appreciates, supports and respects the distinctive ministry of the head and school Trustee members.
- The school Trustee appreciates, supports and respects the unique ministry of the rector and vestry.
- Vestry members help to set the tone for the parish and, in both words and actions are supportive and positive about the shared ministries of the church and school.
- Trustee members help to set the tone for the school, and in both words and actions, are supportive and positive about the shared ministries of the church and school.
- The vestry and the school Trustee together ensure a healthy, harmonious parish community, and seek to understand and support the unique role of the partner governing body.
- The Trustee sets policy, oversees the school's management, ensures financial stability, and plans for the future.
- The Trustee is responsible for hiring, evaluating, and supporting the head of school, who serves at the discretion of the Trustee.

The Rector and Head

- A mutually supportive relationship between the parish rector and the school head is a critically important component in a positive and productive parish/school partnership.
- The rector is a crucial link within the governance structure of the congregation and the school. He or she is the spiritual leader of the parish.
- The head of school sets the tone in all areas of the life of the school and serves as both the academic and spiritual leader of the school community.
- The head communicates to the parents and the larger community the goals of the school, including its special nature as an Episcopal school.
- The rector seeks to be visible in the life of the school, and such visibility is openly welcomed by the school community.
- The head may or may not be an official member of the congregation, but is clearly visible in the life of the congregation.
- The rector is entrusted to promote the spiritual life of the parish and its school.
- The rector supports the delegation of authority by the vestry to the school Trustee for the oversight of the school and, through the Trustee, to the head for administration and operations.
- The head is responsible for the care and support of the faculty and staff, and hires, evaluates and terminates faculty and staff. The head is responsible for curriculum and instruction in the school.
- If the school chaplain also has responsibilities in the parish, the rector provides oversight and evaluation of the chaplain in parish programs while the Head holds the same authority and responsibility in the chaplain's school duties.
- The head works with the Trustee and oversees all areas of management, financial affairs, fundraising, and academic programs.
- In consultation with the rector, the head develops the religious programs for the school.

- The rector builds understanding and models support for the different ways in which the congregation and school fulfill the mission of the parish, the rector helps parishioners appreciate the ministry of the school, and at all times models positive, enthusiastic support for the parish day school, its mission, and its leaders.
- The head builds understanding and models support for the different ways in which the congregation and school fulfill the mission of the parish. The head helps the school community appreciate the ministry of the church, and at all times models positive, enthusiastic support for the parish, its mission, and its leaders.
- The head establishes avenues of effective communication with the rector, vestry, and congregation.
- The head respects the role of the rector as the leader of the parish, and works to create a trusting, collegial relationship with the rector.
- The rector views the head of school as a leadership partner, and works to create a trusting, collegial relationship with the head.
- The head is responsible for the admission of children, and with the faculty and staff, guides their progress and recommends future placement.
- The vestry, Trustee, rector, and head work together to establish a policy regarding the admission of parish children.

Communication

- Vestry and Trustee membership assure appropriate representation of both school and church leadership.
- Regularly scheduled meetings (preferably weekly) are held between the rector and head, and the head and Trustee chair. Time together builds trust, strengthens the relationship, and offers mutual support to leaders who are called to model unity and respect.
- Vestry and Trustee members meet together several times each year to get to know one another, to learn about the priorities of the partner institution, and to plan together. Time together builds the leadership partnership.
- Effective partnerships depend upon good communication, trust, and collaboration. “No surprises” is a model that supports the partnership and enables leaders to model a united spirit when confronted with the inevitable controversies and crises that arise.
- When disagreements or conflicts occur, leaders of the church and the school practice exemplary behavior. A trusting partnership endures when leaders demonstrate consistent support of one another, even when there are differences of opinion.
- School events are open to vestry members, and an annual “Vestry Visiting Day” is recommended. Likewise, school Trustee members are recognized and shown appreciation at an annual “Episcopal School Sunday Service.”
- Agreements regarding shared space and maintenance costs are created in partnership with the vestry and Trustee, and are reviewed on a regular basis.

Planning

- Annual and long term goals, developed and adopted by the Trustee, guide the work of the Trustee and head. Periodic reports are given to ensure Trustee oversight of progress in the implementation of the approved goals.
- Joint planning between the vestry and Trustee occurs annually.
- Any formal strategic planning or discussion of major financial initiatives includes consultation with the leadership group of the partner institution.

Leadership Transition

- Orientation of new vestry and Trustee members includes training about: best practices in governance the Episcopal identity of the school the institution they oversee, and also the partner institution
- When a search is undertaken for a new rector or head of school, representation from the partner institution is included on either search committee.
- In the search process, candidates for the position of either rector or head are fully educated about both the church and the school, and about the various leadership roles and responsibilities in both institutions that come with the position.

Evaluations

- The Trustee annually evaluates the head of school through a process developed by the Trustee in consultation with the head. The most effective evaluation process focuses on pre-determined goals for the year, and measures the head's progress in accomplishing the goals.
- The Trustee annually evaluates its own performance and determines areas for improvement.

In summary, The National Association of Episcopal Schools commends these principles to church and school leaders. As role models for the children and families served in Episcopal schools, these leaders are called to uphold the values that underlie and inform these principles:

- the importance of healthy, trusting, supportive relationships;
- the need for an awareness of and respect for boundaries and appropriate roles;
- the responsibility and commitment to continually educate members of the community about effective governance practices; and
- the partnership model that unites a parish with its school.