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■ ARTICLE

Case Study: Using the Governance Committee to Change Board Culture

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Independent school boards face a growing tension: preserving the institutional knowledge and culture that define a school's identity while preparing to govern amid increasing uncertainty. This challenge has intensified as head-of-school tenure is shorter, demographic shifts are reshaping enrollment patterns, and financial pressures are forcing families to scrutinize the value of an independent school education. In this context, boards can no longer rely on instinct or tradition alone; they need intentional systems that build capacity over time. Few investments are more important to the board than building the capacity of an



often-overlooked committee to fulfill its potential as steward of board excellence.

At Wildwood School (CA), the board was not always high-functioning; we were once consumed by day-to-day events and moment-to-moment critiques of the head. After a particularly trying time for the board more than a decade ago, Marc Frankel, Landis Green, and board leadership recognized that improving board effectiveness required changing board culture—and that the governance committee, often underused, was the most powerful lever for doing so. Reenvisioned, the committee became the means of aligning board practice more closely with the school’s mission and its work with children and families.

While other board committees focus on functional areas such as advancement, finance, or facilities, the governance committee focuses on the board itself. Our experience underscores a core truth: High-performing boards do not emerge by accident; they are built through sustained, deliberate work across years and leadership transitions. The committee centers on strengthening the board’s capacity, cohesion, and long-term stewardship of Wildwood through work that makes recruitment intentional, onboarding developmental, and term limits flexible.

Today, Wildwood’s governance committee has nine or 10 members—including a former board chair, a governance consultant to independent schools, and some parents of current students. Members are chosen for their insight into people, which is useful in identifying prospective trustees, and for their demonstrated leadership on the board, skills essential to trustee recruitment and, when necessary, board discipline.

This work demands attention not only to what the board does but to how it is composed, developed, and renewed over time. In the onrush of internal and external pressures, intentional practice can easily slip. Wildwood’s governance committee keeps an eye on the compass—maintaining orientation while subtly guiding the board through shifting conditions.

Trustee Development

Wildwood's board follows a developmental life cycle in which trustees are recruited, developed, strategically deployed, periodically redeployed, and eventually off-boarded—ensuring continuous renewal rather than static service. Each stage strengthens both the individual trustee and the board as a whole. The governance committee drives this work of trustee development.

Identification and Recruitment

High-functioning governance committees set clear priorities for board membership, maintain a steady pipeline of prospective trustees, and cultivate relationships well before extending an invitation to serve. At Wildwood, we consistently follow good practice to identify individuals with the needed skills and perspectives, engage them in school life through committee work or volunteer roles, and assess their fit with the board's culture and evolving strategic needs. The governance committee invites other trustees to recommend community members who have distinguished themselves, and we work closely with school administrators, whose insight is invaluable in identifying a parent's potential contributions or spotting possible concerns. By soliciting input from multiple sources and assessing each candidate's likely success with honesty and care, Wildwood's board has strengthened its ability to engage in healthy, constructive disagreement while still speaking with one voice once meetings conclude.

We also attend to diversity in its broadest sense—not only demographics but also professional backgrounds, areas of expertise, and ways of thinking. A board composed entirely of business executives may excel at financial oversight but lack the educational perspective necessary to assess academic programs; similarly, a board drawn exclusively from current parents may struggle to take the long view that effective governance requires. To ensure a balanced mix of perspectives, our governance committee maintains a matrix of current and needed competencies, revisits it regularly, and uses it to guide recruitment priorities.

Onboarding as a Multiyear Process

Effective onboarding begins well before a trustee's first meeting and extends long after it. At Wildwood, we have created a multiyear process that includes mentorship from experienced trustees; a scaffolded introduction to committee work, including a required year on the finance committee; regular check-ins with the board chair; and ongoing opportunities to deepen understanding of the school's history, culture, and strategic direction.

We also strategically pair new trustees with seasoned board members to accelerate learning and strengthen cultural transmission. Mentors serve not only as guides to formal policies and procedures but also as translators of unwritten norms—how the board approaches disagreement, what questions are most helpful, how trustees balance advocacy with inquiry, and how to navigate the relationship with the head of school. Mentors, who are members of the governance committee, sit beside their new trustees during meetings and debrief with them afterward. These informal lessons—and this early meaningful relationship—often prove as valuable as any written orientation materials.

Ongoing Education and Development

The governance committee creates regular opportunities for trustees to deepen understanding not only of issues facing the school but of governance best practices, emerging trends in education, and the broader independent school landscape. At Wildwood, we invite external facilitators to board retreats, discuss articles or case studies during meetings, attend regional and national association conferences, and conduct self-assessments that prompt reflection on both individual and collective performance. While many other boards say they use a similar approach, what distinguishes us is the consistency and depth of each practice.

At Wildwood, trustees complete self-evaluations late in the spring semester and then meet with members of the governance committee to review their responses. The committee compiles all survey results, discusses them in its final meeting, and analyzes themes that can inform trustee development efforts for the year ahead. It is a robust and time-consuming process, but one that gives trustees the opportunity to honestly assess—and when necessary, recalibrate—their individual contributions to the work of the full board.

We embed ongoing learning opportunities into the regular rhythm rather than treating learning as separate from governance. At Wildwood, the board chair and head of school, in consultation with the governance committee, select five or six topics for our 30-minute pre-meeting education sessions. Within committee or full board meetings, routine agenda items become learning moments: Discussion of enrollment trends illuminates demographic shifts; a strategic planning update introduces scenario thinking and adaptive strategy; a finance report builds financial literacy across the full board. This integrated approach makes trustee development sustainable rather than burdensome.

Intentional Off-Boarding

Because Wildwood does not impose strict term limits, intentional off-boarding is essential to board renewal. The governance committee takes on the difficult conversations about service beyond a second term, recognizing that board seats are strategic assets to be deployed with care.

When trustees complete their service, valuable knowledge can leave with them. We mitigate this loss through intentional off-boarding, including archived exit interviews that capture insights into board effectiveness, institutional challenges, and institutional memory. An emeritus program keeps selected former trustees connected as advisers while making room for new voices.

Off-boarding is also an opportunity to honor service. At Wildwood, this is most evident in the board's final meeting of the year, when we celebrate departing trustees with stories—sometimes playful, always grateful—along with gifts of appreciation. Through exit interviews, trustees reflect on their service, often becoming ambassadors who continue to support the school through fundraising efforts, recommending future board candidates, and championing the institution in their communities.

Keeping Past Board Chairs

Former board chairs are a singular source of institutional knowledge. They have navigated the complexities of the chair role, managed relationships with heads of school in both calm and challenging periods, and guided the board through

decisions that shaped the school's trajectory. Their lived experience—being present when crises unfolded, values were tested, and major decisions were made—constitutes a reservoir of wisdom that disappears if they step away entirely. When they remain involved in an appropriate supporting role, that knowledge stays accessible to current leadership.

At Wildwood, we have benefited from having as many as four former board chairs at the table at once, staying on for additional terms as regular trustees. Their experience provides a meaningful counterweight for newer trustees, creating a balance—often a synergy—that cannot be manufactured. Their continued service also sends a powerful message: This work is deeply rewarding, even after many years.

For current board chairs, former chairs are an invaluable resource. Susan Olsen's relationships with her predecessors differ, but they all serve as mentors in managing meetings, partnering with the head of school, and handling challenges from other trustees. They provide informed, confidential counsel that only former chairs can offer, easing the isolation of the role and reminding her she is not "running the race alone."

Retaining former chairs, however, requires careful management. They must have proven themselves to be able to step back from leadership, support rather than direct current officers, resist revisiting past decisions, and serve in whatever capacity the board needs—even if that means less prominent roles than they once held. The governance committee has set these expectations and is ready to address any friction that may arise; past board chairs extending their service have served as exemplary models.

Rethinking Term Limits

Independent school boards often adopt strict term limits—sometimes even embedding them in bylaws—to ensure rotation, prevent entrenchment, and create opportunities for new trustees. Doing so can help board leaders avoid uncomfortable conversations with problematic trustees, yet rigid adherence can also create challenges, especially during periods of transition.

At Wildwood, trustees understand that two three-year terms are typical but no formal term limits exist. Some trustees serve a third or fourth term because of the specific contribution they bring; a few have even served over multiple decades. By building flexibility into term-limit practices, the governance committee can extend terms during leadership transitions or retain trustees with critical expertise for major initiatives such as capital campaigns or construction projects. The goal is not to abandon the notion of term limits, but to ensure that terms serve the institution rather than constrain it during pivotal moments.

The Work Continues

Reimagining the governance committee has made it a strategic asset. Its responsibility is to ensure the board's capacity, cohesion, institutional memory, and culture—so the school can navigate both predictable transitions and unexpected challenges. The governance committee is not merely filling seats; it is intentionally cultivating leadership the school will need for years to come.

Go Deeper

Why do trustees need to give and ask for gifts? ***The Trustee's Role in Fundraising: A Pain-Free Guide to Making a Major Difference for Your School***, a practical 22-page booklet, can help them understand. Highlights include fundraising myths and realities and advice on overcoming askophobia. [Order copies](#) for your board orientation and training sessions.

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