

Essential Questions and Data for Trustees and Leadership

Over the years, I have put together an array of “essential questions”, some that require hard data, some softer data, and some historical knowledge. The key idea is that you, your trustees, and any other key players should know the answers to all these questions. If you do, foundational knowledge for strategic decision-making is enhanced.

Governance

1. Is there a strategic plan, and when was it adopted?
2. Is there a strategic financial plan?
3. Is tuition rising in line with inflation?
4. Who were the last five heads of school and length of tenure?
5. What is the name of the auditing firm?
6. What was/were their top recommendation(s)?
7. What are the terms for trustees and officers?
8. What are the names of all the board subcommittees?
9. What are your school's top three in each of these areas:
 - Strengths?
 - Weaknesses?
 - Opportunities?
 - Threats?

Facility

1. How many acres is the campus?

2. How many square feet of indoor space does the school have?
3. What is the square footage per student?
4. What is the annual budget for the physical plant?

General Finance

1. What is the total budget?
2. What is the operating surplus/deficit?
3. What is our income less expenses versus benchmarks?
4. How does tuition compare with benchmarks?
5. How does Net Tuition Revenue compare with benchmarks?
6. How much is in the endowment?
7. What is the total debt?
8. What is the annual budget for food services?
9. What is our expenditure on professional development?
10. What are the ancillary programs/profit centers of the school, and what do they net?

Advancement

1. How much did the annual fund generate last year?
2. What is the parent participation rate?
3. What are the other key fundraising events, and what do they net?

Tuition Discounts/Financial Aid

1. What is the need-based financial aid budget?
2. How many students does it serve?
3. What's the percentage of financial aid compared with the total budget?
4. What is the tuition remission policy?

Staffing and Compensation

1. What are the starting, median, and high end teacher salaries?
2. How do salaries and benefits compare with benchmarks?

Admission/Enrollment

1. How does enrollment compare with benchmarks?
2. What does our admission funnel (from inquiries to applications to acceptances to enrollments) data tell us?
3. What is the attrition rate, and how does that compare with benchmarks?
4. What is the annual enrollment trend?
5. What is the target enrollment?
6. What is the average class size per division and grade?

Essential questions that are less answerable by data but will provoke deeper insights and excellent conversation

Here are some fundamental ideas in the form of reflection-promoting questions that are at the core of who we are as independent schools. Over the years, I have done many presentations for parents and professionals fleshing out the importance of each.

1. How are you independent?
 - The idea that allows the other ideas the freedom to breathe...
2. How are you intentional?
 - What is your North Star?
3. How are you evidence-based?
 - If something is not working, do you consult the evidence?
4. Does one size fit all?
 - How individualized are you?
5. Do you teach skills and habits in addition to traditional content?
 - Arguably as much or more than content knowledge, you want students to leave your school with a vast array of transferable skills and habits. Are you maximizing your executive functioning and social emotional learning opportunities?
6. Do your students, staff, and parents feel they *belong*?
 - Are you creating and cultivating a space that centers belonging...where everyone is seen, heard, valued, and loved...?
7. Is your communication clear, consistent and proactive?
 - Are you partners with parents? Do you employ the notion that an ounce of prevention is worth a pound of cure? Do you go beyond anecdotes and use benchmarking data to answer your most important questions?
8. Do you celebrate and empower students?
 - Do you specifically and systematically identify and provide opportunities to showcase student strengths?

9. Do you create advocates of graduates?

- Perhaps the most important trait of a graduate?