Second Generation Montessori School Leadership

K.T. Korngold
&
Mary Beth Ricks
Thank you for participating in this workshop. We realize you had other choices, such as the March for Our Lives rally.

Montessorians are passionate about peace and we believe we all share the goal of being part of the solution for a peaceful tomorrow.
Introductions
Change your opinions, keep to your principles; change your leaves, keep intact your roots.

– Victor Hugo
Introductions

Who are we?

How did we get here?

What led each of us to this room?

Why are we passionate about this topic?
K.T. Korngold

- CEO of the Center for Montessori Education | NY
- Owner of the Montessori Children’s Center
- AMS Infant and Toddler Credential (CME | NY)
- AMS Administrator Credential (CME | NY)
- MA Columbia University
- BA Wesleyan University
- Early Childhood Graduate Credits, The College of New Rochelle
- Founder, Pathways to a Peaceful School Conference
- Author
Mary Beth Ricks

Head of School of Bowman

- Teaching in public and private schools since 1988
  - Founding teacher at Bowman 1995-2005
  - Director of Education 2005-2008
  - Member of AMS and IMC since 1995
- Graduate of Purdue University, St Mary’s College, CSMS
- Accrediting Commissioner for IMC
- President of BAMA
- Member of Board of Montessori Council of California
How are we going to spend our time?

- Who is the audience?
- What are the issues
- The Family Business
- Board Of Trustees
- What is our Philosophy of Leadership?
- Shared Commitment
- Building Trust
- Tricky topics
- Finance
- Staffing
- Managing the generations
- The Legacy
- Honoring the past
- Making your mark
- Wrap Up
Who is our audience?
Show of hands...

Who is here?

✧ First generation?

✧ Second?

✧ Third?

✧ Any Fourth?

Who is part of a family organization?

Who is taking over from a long time head but not related?

Who here has a Montessori Teaching Credential? Montessori Admin Credential? Neither?
Statistics

Business success over generations

- 2nd generation: Succeed 25%, Fail 75%
- 3rd generation: Succeed 0%, Fail 100%
Family Business

Think about it this way:

✦ if you have made it thus far – you are doing pretty well, at least until the time comes to consider passing it on to your offspring!

✦ What are some of the obstacles and what are some of the keys to success?
Family business strength benefits

✦ Have made personal investments
  ○ Governed by those with emotional and a financial investment: they “own” it.

✦ Have a long term vision
  ○ Family owned companies reinvest in the organization with a long-term perspective.

✦ They are adept and adroit
  ○ Family ownership can move faster in decision-making processes than board driven school organizations.

✦ They can strike a balance between risk and control
  ○ There can be long-term stability in leadership that extends from generation to generation with the primacy of the family allowing for a mix between prudence and entrepreneurial spirit.
Final note about a family business

The successful transfer from first generation to second generation (or second to third) requires three important commitments:

✧ The first generation must **want to pass the baton** to the second.
✧ The second generation **must want to receive the baton** from the first.
✧ The two must be committed to **work together** to ensure a smooth, orderly, and successful transfer of power, responsibility, and authority.
What are a few issues with passing the torch?
81%

Owners **want** their business to stay in the family
20%

Owners in that same survey were not confident of the next generation's interest to join their business.
Why adult children leave the business...

A survey of the adult children of business owners found that the most commonly cited reasons for not joining the family business are:

- A feeling that the business would “not allow me to use my talents”
- A lack of interest in the particular business owned by the parent
- Insufficient clarity regarding the role of the second generation within the business while the parent was still involved
Ensuring Success

How do we ensure that there is a meaningful place for the second generation at the table?

✧ They might be great at social media.
✧ Perhaps they understand coding.
✧ Might they be able to revamp the website?
✧ Maybe they love interior design?
✧ Maybe they can create the new addition for the school? Perhaps they love gardening or woodworking?

If they are welcomed at the table, they are more likely to want to join.
Schools with a Board of Trustees
The Role of the Board

My School is governed by a Board of Trustees that is responsible for guiding and assessing the effective implementation of the School’s mission through oversight of four areas outlined in the School’s bylaws:

1. Keep in trust the mission and vision of the school

Strategic Planning and Thinking
Trustees are responsible for defining and monitoring the short- and long-term goals of the school as determined through a periodic strategic planning process. An ongoing practice of strategic thinking gives the board the flexibility to react to unforeseen opportunities and circumstances that will have an impact on the school.

Setting Policy
The trustees set policy in accordance with the school’s mission and institutional goals.
The Role of the Board

2. Hiring, Evaluating and Supporting the School’s Head of School

The board supports the head in the day-to-day operation of the School but is not involved in management or administration. The head, not trustees, hires, supervises and evaluates all faculty and staff.

3. Financial Stability of the School

In order to ensure the financial stability of the School, trustees are responsible for approving the yearly budget, including the setting of tuition. As trustees, they also support and participate in fundraising efforts.

The Board of Trustees believes that open and clear communication advances the mission of the school. They welcome inquiries from parents regarding any of their areas of responsibility.

http://www.nais.org/Series/Pages/Board-of-Trustees.aspx
Expectations of the BOT

- Participate as fully as possible
  - Attend meetings
  - Attend key events (calendar provided)
  - Volunteer for a minimum of one but ideally 2 of the following
    - A Key Role
    - Committee Participation
    - Task force participation
  - Keep all discussions absolutely confidential

- Assist in fundraising

- Recruit new board members over time

- Participate in Board Education
  - Arrange an observation at the school
  - Arrange an observation at another Montessori school or K-8 independent school
  - Read the NAIS Trustee Handbook/Bylaws
**BOT and HOS partnership**

Chapter 3: Developing and Reviewing Policy

**SAMPLE MATERIALS**

**DESIGN OF THE PARTNERSHIP**

<table>
<thead>
<tr>
<th>Policies</th>
<th>Time and Attention Graph</th>
</tr>
</thead>
<tbody>
<tr>
<td>Strategies: mission, survival, leadership, major</td>
<td>Board's Decisions</td>
</tr>
<tr>
<td>Partnership: authorizations, finance policies, enrollment, employment terms</td>
<td>Head's Advice</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Operational admissions, staffing, program systems</th>
<th>Shared Decisions: Board and Head</th>
</tr>
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</table>

Above the diagonal line = allocation of board's time
Below the diagonal line = allocation of head's time
Final thoughts on BOT and HOS

- The BOT has played a part in both the succession plan and the hiring of the new head
- The BOT plays an leading role in the success of the new head
- The BOT plays an leading role in the graceful exit of the founding head
Creating a Leadership Philosophy
Define the issues

- What are the steps to leadership?
- What are the things to consider as you move into the role?
- What are the challenges you face?
- What are the rewards you will receive?
Questions we ask ourselves

✦ How can I move the organization forward while maintaining the mission and vision of the past?
✦ How can I get the staff to buy into the new vision?
✦ What should I expect in this process?
✦ What is on your mind?
Step 1: Philosophy of Leadership

So You’re in Charge Now What? The 8 Point Plan by Thomas Neff

❖ Write a mission statement
❖ Make a 10-20-30 year plan
❖ Create a change plan
❖ Start small
❖ End big

ALSO: Have SMART goals (Smart, measurable, achievable, realistic, time sensitive)
Case Study

The 3-2-1 Meeting

3 things you love

2 things you don’t love

1 wish

Held meetings at 3:21pm daily with all staff!
Shared Commitment
Step 2: Renew the Shared Commitment

+ What is the mission and vision of your school?
+ How can you determine who is on board?
+ Who is your strongest follower?
+ Who is your strongest deterer?
Case Study

- 1st generation started and ran school
- 2nd generation inherited it after death
- Promises were made to staff
- No written record

- Next steps are?
Trust
Building Trust

“Trust is the glue of life. It is the most essential ingredient in effective communication. It’s the foundational principle that holds all relationships together”

– Stephen R. Covey
Building Trust

The community must trust that the second generation is capable

1. Prove Competences
   ✢ Show you have the skills
   ✢ Demonstrate you have the knowledge
   ✢ Exhibit that you know what you are doing
   ✢ Get the necessary credentials if you don’t have it
Building Trust

2. Prove Credibility

⬆️ Be credible
⬆️ Be reliable
⬆️ Come through when you say you will do something
⬆️ Be able to communicate with others what you know
Building Trust

3. Be Responsible

✦ Show your community they can count on you.
✦ Create an advisory board you can both trust to be a sounding board.
✦ Take responsibility for failures whenever they occur.
✦ Share credit of your successes with others.
Reducing Mistrust

The story of the California Roll
Final thoughts on trust

What are the questions that folks ask themselves regarding trustworthiness?
✧ Is the person competent?
✧ Is the person reliable
✧ Is the person honest?

How do you demonstrate those traits?

You show them everyday when you show up for work at the school!

That’s why it takes time to prove trustworthiness.
Case Study

Parent Ambassadors Build Trust
Time to Prepare
Proper training is important, necessary, and required!
Preparations and Qualifications

What does preparation and qualifications mean?

✦ College/Business degree
✦ Experience working in the school at a variety of positions
✦ Montessori Administrator Credential
Change is hard
How we communicate to our community about the change of leadership and the new leadership itself is extremely important.

Transparency is necessary.
Communication

Meeting with folks in person – your community should know who the second-generation person is well in advance of the “takeover”.

Get yourself known – you are your own person, and you will have your own style.
Case Study

Communication styles with 1st generation
- Newsletters
- Weekly meetings
- Feedback

Communication styles with 2nd generation
- Flexible meetings
- Technology
- Feedback
Break out

Taking stock

What stage are you in:

- Gearing Up: getting ready to pass baton
- In Motion: in the process of passing the baton
- Beginning the Journey: 1-3 years after the transfer
- On Your Way: 3 or more years later
Tricky issues

How puzzling all these changes are!
I’m never sure what I’m going to be, from one minute to another.
– Alice
Finance

- Do you understand financials?
- What are the state of the finances?
- What is the 5 year plan?
- Do you have a workable budget?
A word about the financials

Hire people you trust
Hire for the skills you need
Outsource:
  - Bookkeeping/Billing
  - Payroll
  - Insurance
  - HR
  - NBOA, CAIS, ISM
  - Legal
Let’s go back…

- How can you determine who is on board?
- Who is your strongest follower?
- Who is your strongest deterer?
Your staff is your school
Managing many generations

When I was your age, "Cell Phones" is what someone who worked at Radio Shack did for a living.
This is the first time in American history that we have had *four* different generations working side-by-side in the workplace
Traditionalists

Baby Boomers

Generation X

Generation Y
Traditionalists Facts and Figures

- Born before 1946
- 49 million Traditionalists
- 83% of pre-retirees
- 90% of retirees are confident they have enough money to live comfortably until at least age 85 (MetLife Study)
- Almost 2/3 are married
- 29% are widowed/divorced/separated
- 3/4 are grandparents
- Education: 60% attended high school, 38% earned a high school diploma, 26% went on to earn a college or post-grad degree
- Male/female ratio: about 46% men; 54% women
Snapshot of a Traditionalist
Baby Boomer Facts and Figures

- Born 1946-1964
- 78 million Boomers
- Most are married, many more than once, and nearly 25% have been married 25+ years
- Half are without kids
- 1/3 are grandparents
- 77% are employed; ⅔ work full time
- More than $2 trillion in income
- Boomers represent half of US households with an income of $100K+
- Nearly 1/3 own homes valued at $200K+
- 49% graduated high school or equivalent; 39% have Associates Degree or higher; 12% did not graduate from high school
- Male/female ratio: 49% men; 51% women
Snapshot of a Baby Boomer
Generation X Facts and Figures

• Born 1965 -1977
• Best educated generation in the U.S.
• Divorce rate is 50%
• Education: 40% have earned a college degree or higher
• Nearly 2/3 are parents
• ½ are working parents
• More than 60% own their own home
• More than half have a household income above $50,000 per year
• Male/female ratio: 48% men; 52% women
Snapshot of a Generation X
Generation Y Facts and Figures

- Born 1978-1989
- Largest consumer group in the history of the U.S.
- Total incomes exceeding $211 billion
- Spends $172 billion per year
- Saves $39 billion per year
- 38% are nonwhite, 15% African-American, 14% Hispanic and many identify themselves as multiracial
- 29% of the U.S. population, or approximately 61 million consumers
- 30% of those 18-24 are currently attending a college or university
- Among those 18-24 50% men; 50% women
Snapshot of a Generation Y
The makeup of the global workforce is undergoing a seismic shift:

Millennials—the people born between 1977 and 1997—will account for nearly half the employees in the world.

In some companies, they already constitute a majority.

Harvard Business Review 2010
Nurturing and inspiring Traditionalists

- Traditionalists: keep them plugged in.
- The Traditionalist holds more institutional knowledge and has more industry experience than any other group, but more than 95% of them have already retired.
- However, organizations that place a premium on the intellectual capital and institutional knowledge that those remaining from the Traditionalists hold are granting valued retired employees an “emeritus” status and calling upon them now and then for wisdom.
- Partner for mentorships
Nurturing and inspiring Baby Boomer

- Baby Boomers: keep them on board for as long as you can.
- The Baby Boomers are the “Me” generation, the first generation to become Internet savvy and make work-life balance a movement that has permeated our workforce culture.
- They are also one of the most valuable segments of our workforce today. Many Boomers are planning for retirement, which will potentially inflict the largest “brain drain” corporate America has ever experienced.
- The organizations that initiate ways to help Boomers continue working and making an income on their terms so they can enjoy more of their life will retain more of these premium workers
Nurturing and inspiring Generation X

- Generation X: start developing them into leaders for tomorrow, today.
- Generation X will be called upon to fill leadership positions as Boomers start to retire over the next 10 to 15 years.
- The future success of many organizations relies heavily on how they are developing this next generation of leaders.
- A critical aspect of the multigenerational workforce at present is that today’s Boomer leaders are responsible for cultivating the leaders of tomorrow from the Gen X segment of the workforce.
- Is your school working to develop high-potential employees today and prepare them to take over leadership roles tomorrow?
Nurturing and inspiring Generation Y

- **Generation Y: train and nurture them.**
  - Gen Y spans a diverse range of ages. This generation is sometimes referred to as “Echo Boomers” since they are the children of the Baby Boomer generation.
  - Gen Y is expected to make a significant impact on the overall workforce — and they are well on their way.
  - Managing Gen Y can sometimes be challenging for Baby Boomer managers or even Gen X managers since Gen-Yers don’t hesitate to challenge the status quo.
  - To overcome this, managers should understand how to be democratic and “partner” with their Gen Y workers and treat them as equals.
  - Those who can manage their Gen Y workers with a “we’re-all-in-this-together” attitude will find this segment of employees to be pragmatic and hard-working with a strong sense of self and individualism.
## DEFINING GENERATIONS

### HOW I PREFER TO COMMUNICATE WITH YOU...

<table>
<thead>
<tr>
<th>Generation</th>
<th>Age</th>
<th>You Prefer...</th>
</tr>
</thead>
<tbody>
<tr>
<td>Traditionalist</td>
<td>60</td>
<td>Let's have a conversation</td>
</tr>
<tr>
<td>Boomer</td>
<td>50</td>
<td>Call me on my cell</td>
</tr>
<tr>
<td>X’er</td>
<td>35</td>
<td>Send me an e-mail</td>
</tr>
<tr>
<td>Y’er</td>
<td>30</td>
<td>Text me</td>
</tr>
<tr>
<td>Millenial</td>
<td>25</td>
<td>Facebook/ Tweet to me</td>
</tr>
</tbody>
</table>
Getting the best
Relevance

• For all groups of workers, work must be relevant.

• Leaders always need to communicate a task’s relevance. If a task is relevant, it will make the school relevant
Accountability

● Leaders must be very clear about what it means to be accountable in the workplace.

● Leaders have to show everyone why everything they do in the workplace counts and helps build a good environment.

● Employees have a responsibility to look beyond themselves too.
Motivation

• First cousin of accountability and relevance, motivation can be a mystery for a leader.

• Taking the time to understand what motivates workers is a huge investment, but it’s absolutely necessary.

• Unmotivated workers won’t care about the workplace, and that’s the first step down the path to workplace destruction.
Trust

• As the work world becomes increasingly driven by social media and social technologies, trust becomes more important.

• Trust is earned, like respect. Workers who trust management will also trust the workplace.
Emotional Connection

- A strong leader is a proponent of the workplace value of Emotional Intelligence.
- The leader with emotional intelligence understands the need for an emotional connection with everyone in the workplace.
- You don’t have to be best friends, but you do have to be sensitive and aware to the emotional tenor of the workplace.
- Ignore emotional connection and no one will care about your workplace.
Leaving a legacy
Honoring the Legacy

Founder’s Day

Celebrate your founder’s birthday annually on the school calendar. This is an opportunity to honor your founder and tell the unique story of the creation of your school. This helps build community and a shared ritual. In addition, your founder can return year after year to this event.
Honoring the Legacy continued

Scholarship

Create a scholarship in your founder’s name. Keep your founder’s generosity and commitment to the school as part of the nomenclature of the school. Families, business, community members can contribute to sponsoring this fund.
Honoring the Legacy continued

Develop a Teacher Fund

Your founder was dedicated to Montessori and in that spirit, start a fund that sends a teacher to Montessori credential training or to the AMS conference each year.

You can have parents donate to the fund.
Honoring the Legacy continued

Founder’s Corner

Create an area of the library with your founder’s books—the founder can come to read to children or perhaps a special place in the garden for the founder to work with the children.
Your legacy
Making your own mark

- Find your own peer group
- Find your own mentor/coach
- Make your own connections
- Don’t be afraid to reach out to others in the area
- Set your own goals for the school
- Create benchmarks for success
  - How will you know you have accomplished your goals?
- Create a road map or strategic plan
Making Your Mark

Break out:

“Your mother never did it that way”
Wrap up

Three tips to consider when taking over from a company founder:

1. Think and act like an interim steward, caring for and managing the business until someone else’s turn to take the reins
2. Honor and respect the founders, and what they and their team have built
3. Stand on their shoulders and propel the organization forward
To pay attention, this is our endless and proper work.

-Mary Oliver
Questions?
Thank you!

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Resources

Books:
- Generations Working Together
  Laura E Bernstein
- What Great Principles Do Differently
  Todd Whitaker
- The 12 Elements of Great Managing
  Rodd Wagner and James K Harter
- Good to Great
  Jim Collins
- You’re in Charge Now What?
  Thomas J. Neff
  And James M. Citrin
- The 21 Irrefutable Laws of Leadership
  John C. Maxwell

Websites:
- 5 Leadership Toys For The Multigenerational Workplace Sandbox- Forbes 5/28/2012
- WHAT MATTERS AND HOW THEY LEARN? how different are they? fact and fiction- United Nations Joint Pension Fund
- Link to Forbes article