

District Local Here

ABC SCHOOL DISTRICT

Proposal for
Board/Superintendent Retreat & Engagement

Prepared by
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DATE

Overview

The **ABC School District** is entering a period of transition following recent changes in Board and district leadership, as well as a period that has required significant attention to relationships within the district and with the broader community. At the same time, there is a need to clarify direction and reestablish a shared understanding of priorities and the current state of the district's consistency.

In this context, how the Board and Superintendent work together is central to the District's ability to move forward with and focus. Clear roles, consistent communication, and shared expectations provide the foundation for effective governance and for sustaining progress across the system.

This proposed Board Retreat engagement takes place within the first few months of **New Superintendent's Name** start date and focuses on establishing that foundation early. The intent is to surface key themes, reflect on current practices, and leave with a clear set of agreements about how the team will operate together.

Core Objectives

Through this work, the Board and Superintendent will:

- ***Clarify roles and responsibilities within the governance structure***
- ***Establish shared expectations for communication, including how information is requested, shared, and discussed***
- ***Identify patterns in how the Board currently operates and consider where adjustments may be helpful***
- ***Define a small set of working agreements to guide how the team operates day to day***
- ***Create a clear starting point for working together at the outset of **New Superintendent's Name** tenure***

The quality of a retreat depends on the level of preparation that comes before it. For that reason, we do not approach this work as a single session. Prior to the retreat, HYA will conduct individual interviews, administer a structured Board self-evaluation, and facilitate a team insights assessment. This work is used to understand how each Board member and the Superintendent views their role, how communication is experienced, and where there may be differences in expectations or approach.

This preparation allows the retreat to be built around the team's actual dynamics and priorities. Rather than starting from a blank agenda, the session is designed to address specific patterns and questions that are already present. The result is a more focused discussion and a clearer set of agreements about roles, communication, and how the team will operate going forward.

Approach

At this stage of **New Superintendent's Name** leadership transition, the focus is on building the governance team. Before moving into longer-term planning or broader district priorities, it is important to establish a shared understanding of how the Board and **New Superintendent's Name** will work together, particularly with respect to roles, communication, and day-to-day practices.

This work follows a structured sequence that begins with individual input and leads to a focused discussion and clear next steps. This sequence is intentional. Each step builds toward a more informed and productive session.

The process begins with individual interviews, a comprehensive Board self-evaluation, and a team behavioral and motivational assessment using TTI Success Insights, a DISC-based framework that describes how individuals approach challenges, communicate with others, and respond to pace and structure.

Preparation and Input

- **Interviews**
Provide context that is not captured through other structured tools. They surface how governance is experienced in practice, including how roles are understood, how communication occurs, and where there may be differences across members.
- **Board Self-Evaluation**
Highlights patterns across governance practices. It provides a structured view of how the Board approaches its responsibilities, including areas where expectations are clear and where further alignment may be helpful.
- **Team Insights Assessment**
Focuses on how members work together. Using a DISC-based framework combined with motivational drivers, it provides a shared understanding of communication styles, approaches to discussion, and how different perspectives are expressed and received.

This preparation is used to identify key themes, areas of alignment, and points of difference across the team. These themes directly shape the design of the retreat.

Facilitated Working Session

- **Board Retreat**
Centers on reviewing these themes and working through them directly. Because the session is built on prior input, the discussion can focus on specific issues and decisions specific to the **ABC School District** governing team and context. The work focuses on clarifying roles and responsibilities, establishing communication expectations, and defining a small set of working agreements that can be applied in practice.

Synthesis and Follow-Up

- **Summary Report**

Captures key themes, agreements, and next steps, providing a clear reference point as the Board and **New Superintendent's Name** begin working together.

Taken together, this approach provides a grounded view of the Board's current state and allows the session to move efficiently from discussion to decisions. In my experience, attention to foundational elements such as roles, communication, and how the team operates has a direct impact on how effectively the Board functions. Establishing clarity in these areas creates the conditions for more consistent operations, clearer direction, and stronger working relationships.

This approach is tailored to the District's context and can be adjusted based on timing, priorities, and the needs of the Board and **New Superintendent's Name**.

Scope of Work

Preparation

Prior to the retreat, HYA will gather and review input to develop a clear understanding of current governance practices and team dynamics. This includes:

- Conducting individual interviews with Board members, the Superintendent, and senior leaders as requested
- Administering and reviewing a comprehensive Board Self-Evaluation
- Administering the Team Insights Assessment and reviewing results at the group level

Input from these activities will be synthesized to identify key themes, areas of alignment, and topics for discussion. These themes will directly inform the structure and content of the retreat.

Board Retreat

HYA will design and facilitate an in-person Board Retreat based on the Board and Superintendent's priorities and the themes identified during preparation. The work may focus on, among others:

- ***Reviewing key themes from the pre-work***
- ***Clarifying roles and responsibilities within the governance structure***
- ***Establishing communication expectations and practices***
- ***Defining a small set of working agreements***

The retreat will be structured to support focused discussion and result in clear, practical agreements that can be applied in day-to-day governance.

Summary and Follow-Up

Following the retreat, HYA will prepare a written summary that captures the work and provides a reference point moving forward. This includes:

- ***Key themes and observations***
- ***Agreements reached during the session***
- ***Recommended next steps***

Follow-up conversations may be provided, as needed, to clarify discussion and support next steps.

Proposed Timeline

Phase	Activity	Deliverable	Estimated Timeframe
Preparation	Individual interviews; Board Self-Evaluation; Team Insights Assessment	Summary of key themes and inputs used to design the retreat	2-4 weeks, depending on the Board's availability
Working Session	In-person Board Retreat	Facilitated discussion focused on roles, communication, and working agreements	To be determined (typically half-day or full-day, evening or weekend, based on needs and availability)
Synthesis & Next Steps	Preparation of summary and follow-up conversations, as needed	Written summary of themes, agreements, and recommended next steps	1-2 weeks following the retreat

V. Pricing

HYA has proposed **\$7,500** for total cost. This includes:

- Preparation and follow-up for individual, confidential interviews (board members, superintendent).
- Administration and analysis of comprehensive board self-evaluation survey
- Administration and analysis of the Team Insights Assessment report
- Retreat planning and agenda preparation
- Facilitated retreat by HYA Associate
- Follow-Up Summary Report with key themes, agreements, and suggested next steps

Travel to the District expenses will be reimbursed by the District.

Dr. Mike Richie, HYA Vice President



Mike Richie is an innovative leader who excels in thinking outside the box and is always looking for ways to provide the very best in educational leadership. He believes that strategic goals foster the momentum with which an organization's members can be self-motivated and productive. After 40 years in education, Dr. Richie has served as a teacher, coach, principal, and superintendent in small, medium, and large school districts. In his 26 years as a school superintendent, Dr. Richie is known by his staff and colleagues to be a visionary leader with a positive impact on and improving education. He has led his staff in raising test scores, building community and business partnerships, increasing open enrollment numbers, passing eight referendums, and drastically improving communications, public relations and social media efforts. In 2012, Dr. Richie was named Superintendent of the Year by the National Association of School Superintendents (NASS) for his outstanding achievement as a school district superintendent, continuous improvement and commitment to collaboration and mutual support in the profession.

Dr. Richie enjoys coaching and mentoring superintendents that are new to the profession. He serves on the Executive Committee of the National Association of School Superintendents (NASS), has served as an adjunct professor at Viterbo University teaching classes in leadership, school law, politics and community relations – preparing students for their principal and superintendent certifications. He has visited China twice to give numerous presentations on American Education.

Richie has successfully partnered with numerous school districts and Boards of Education, providing guidance on board governance, superintendent evaluation, executive searches and support, and fostering strong, effective superintendent-board relationships. His expertise in helping boards establish clear governance practices and productive working relationships has contributed to successful district leadership transitions and long-term organizational effectiveness. In recognition of his leadership and service, Richie was named Vice President of HYA in 2022.



Dr. Adam Lechnir, HYA Senior Associate

Adam Lechnir leads governance-focused engagements with school boards and superintendents across the country. At HYA, Mr. Lechnir leads the firm's governance practice, supporting boards and superintendents in strengthening governance during periods of transition, clarifying roles and expectations, and establishing the practices needed for effective decision-making.

He brings more than 20 years of experience in public education, with senior leadership roles spanning governance, strategy, operations, and organizational alignment in large, complex school systems.

As Chief of Staff to the Chicago Board of Education, Mr. Lechnir led the Board's governance work, including strategic planning, strategic community engagement, superintendent evaluation, and Board operations. He established and led the district's external relations and engagement functions, creating a more structured and proactive approach to how the district engaged with stakeholders and the broader community.

He played a central role in structuring governance during periods of significant transition and was a senior member of the district's leadership team, working directly with the Board, Superintendent, and cabinet on major decisions. In this role, he helped shape districtwide priorities and policies, including the redesign of school accountability, implementation of equity-based budgeting, and the elevation of student voice at the governance level. His work was embedded in the district's core decision-making processes, contributing to high-stakes decisions affecting strategy, operations, and systemwide change.

In his current work, Mr. Lechnir supports boards in strengthening governance practices, improving Board-Superintendent working relationships, and establishing clear expectations for how governing teams operate in practice. His work includes facilitation, advisory support, and development of governance systems that support consistent and effective decision-making.

Conclusion

We welcome the opportunity to discuss this approach and adjust it based on the Board's priorities and timing.

Mike Richie

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