

Optimizing Value: Adaptive Leadership Approaches for the Small Boarding School Association



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Katie Louise was born and raised in central Texas and later attended Austin College in Sherman, Texas, where she earned her bachelor's degree in psychology and her master's degree in elementary education. She subsequently received her master's degree in educational administration from The University of North Texas in Denton. Katie taught kindergarten, third grade, and fourth grade before serving as an assistant principal at Agnes Risley Elementary School in Sparks, Nevada. She continued her career in public school leadership as principal of George Westergard Elementary School and Glenn Duncan Elementary School in Reno, Nevada. Katie Louise currently serves as the Director of Professional Growth Systems for Washoe County School District, which supports over 62,000 students in Northern Nevada.

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Table of Contents

Executive Summary5

Introduction and Partner Overview7

Research Positionality9

Articulation of the Problem10

Purpose Statement11

Review of Literature11

Project Questions26

Project Design26

Data Collection and Analysis29

Summary of Findings39

 Finding 139

 Finding 245

 Finding 350

 Finding 455

Discussion and Recommendations61

 Recommendation 161

 Recommendation 264

 Recommendation 368

 Recommendation 471

Limitations73

Conclusion74

References76

Appendix83

Executive Summary

EXECUTIVE SUMMARY

Katherine Drago Luellen • Edith Aloe Traina • Katie Louise Weir

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Background

157 Member Organizations	Annual Conference
Niche-Within-Niche	Cross-Sectional Partnerships
Professional Development	Community

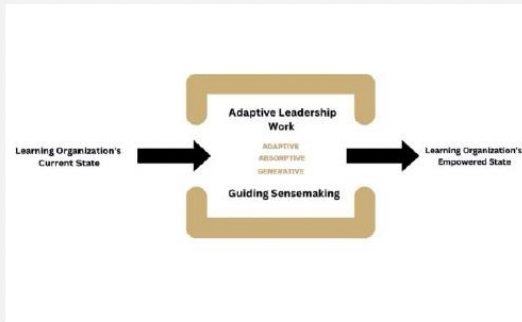
Founded in 1987, the Small Boarding School Association (SBSA) is a unifying body for small, specialized educational organizations that aims to foster rich learning, resource-sharing, connection, and a supportive ecosystem for its members. For 37 years, the SBSA experienced growth and development, particularly in its roster of member schools, its inclusion of affiliate and educational consultant members, and its functionality as a niche educator's network. Its core ethos, however, remains anchored in celebrating the power of sector-wide collegiality and the distinct spirit of the small boarding school. The strong ties to its founding charter result in the tradition of the SBSA's leadership drawing exclusively from volunteers within its membership and the involvement of invested parties adjacent to the small boarding school sphere.

Problem of Practice

SBSA struggles to maintain relevance and viability in an increasingly competitive and resource-constrained educational environment. Compounded by the limitations present in the volunteer-driven structure, the organization's ability to implement robust, strategic initiatives necessary for adaptive and proactive governance appears reduced. The association must find a way to enhance its structural and operational capacities to better support its members and to ensure their survival and prosperity in the face of evolving educational demands and economic pressures.

Conceptual Framework

Organizational empowerment intricately ties to the organization's capacity to navigate and strategically respond to dynamic challenges. This improvement project leverages a conceptual framework of adaptive leadership as a structured pathway for the SBSA to engage in sensemaking regarding the extent to which the association's value proposition empowers the organization. Adaptation, both biologically and organizationally, involves making a change. Within that change, characteristics of the organization will no longer be true of its new evolution. This framework positions the organization for improvement by enhancing its agility in understanding, adapting to, and effectively communicating its unique value in the ever-evolving educational landscape.



Research Questions

1. *What is the perceived value of SBSA according to the leadership?*
2. *What is the perceived value of SBSA according to the membership?*
3. *What disparities exist between the leadership and the membership about the perceived value of the organization?*

Findings

The project findings address the core problem that the SBSA struggles to maintain relevance and viability in an increasingly competitive and resource-constrained educational environment. These findings highlight opportunities for the association, as a learning organization, to enhance structural, operational, and collegial capacities through adaptive, absorptive, and generative leadership to better support and empower member schools operating within the VUCA (volatile, uncertain, complex, and ambiguous) environment. This approach supports the SBSA's ability to adapt to the evolving education landscape while sustaining alignment to the internal values of the organization and the strategic initiatives sought by membership and leaders alike.

FINDING 1: SBSA leaders value the association's profound commitment to cultivating collegiality.

FINDING 2: SBSA leaders value the annual conference as the essential engagement point for the association through which to understand and address the needs of the membership.

FINDING 3: SBSA members highly value the association's open and informed culture, as it fosters a trusting environment conducive to genuine discussions about individual, organizational, and sector-wide challenges.

FINDING 4: The differing views between the leadership and membership regarding SBSA's responsiveness—its capacity for innovation, adaptability, and feedback—reveals a disparity in how each group perceives the association's value.

Proposed Recommendations

Recommendation 1: Revise the SBSA Value Proposition.

Recommendation 2: Promote Community Through Regional Meet-Ups.

Recommendation 3: Enhance Association Visibility.

Recommendation 4: Inspire the Membership through Involvement.

These strategies aim to develop adaptive, absorptive, and generative leadership within SBSA, aiding the strategic journey towards long-term relevance, viability, and empowerment amidst the VUCA environment of the small boarding school sector. This project encourages increasing SBSA's P.R.I.D.E. in the association through promotion, realizing potential, inspiring membership, developing opportunities, and engaging all members in meaningful interactions to elevate the value of SBSA.



Introduction and Partner Overview

Founded in 1987, the Small Boarding School Association (SBSA) is a unifying body for specialized educational organizations within the independent boarding school community. The association aims to foster a culture of learning, resource-sharing, and support for its members. SBSA's membership includes a diverse spectrum of organizations from across the United States, drawing from schools, non-profit entities, and consultant groups, each with a unique mission or focus. For over 37 years, the association experienced growth and development, particularly in its roster of member schools, inclusion of affiliate and educational consultant members, and functionality as a niche educators' network. Its core ethos, however, remains anchored in celebrating the power of sector-wide collegiality and the distinct spirit of the small boarding school. The strong ties to its founding charter result in the tradition of SBSA leadership drawing exclusively from volunteers within its membership and the involvement of invested parties adjacent to the small boarding school sphere. There is no permanent staff, and the association receives funding exclusively from membership dues, without generating revenue through any form of sponsorship, investment, or philanthropy.

The original inspiration for the association centered on creating space to address the unique challenges and opportunities facing small independent boarding schools. These schools offer specialized and intimate learning, functioning as more than mere educational entities; they create sanctuaries for students in search of bespoke learning experiences (Hall, 2023). Over the association's lifespan, its annual conference grew into the signature event through which to engage in this work. For many members, the conference is synonymous with SBSA's purpose and has the reputation for being a "must-attend" event. The conference's relaxed and interaction-driven format, versus more conventional conference design involving lectures and the generic

formality of a hotel ballroom, is considered sacrosanct. Through this intentionality of design—attendance is capped at 200 participants, a member school hosts the event on its campus, it concurs with the final days of independent school spring break, and the schedule prioritizes expansive time for socializing—the conference acts as a symbol of organizational commitment to organic dialogue, camaraderie, practitioner-level expertise, and the benefits of mutual support.

Outside of the conference, SBSA seldom organizes additional professional development or networking programming, nor engages the membership through social media or direct communication. Over the years, there have been some efforts at producing a quarterly newsletter to create social media content and to provide mentoring to new administrators. However, none of these initiatives endured beyond a trial phase.

With the 40th anniversary of its founding fast-approaching, SBSA gives the appearance of a stable, positive, and healthy organization. Based on further context provided by the association's current leadership, SBSA is facing a self-proclaimed inflection point caused by myriad internal and external forces, some specific to the association, others related to independent schools, and many connected to the state of modern educational practices. SBSA's leadership is keen to better understand the impact of these factors on the organization. To date, the association has never engaged in a comprehensive methodological reflection or partnered with an outside group to assess the organization's status. According to the leadership, the resources (i.e., funding, time, and relevant skills) were never readily available for this type of holistic project. This capstone project, in partnership with the organization, aims to systematically explore SBSA's value proposition and provide an outlook on the landscape shaping its opportunities, both present and future.

Research Positionality

Katherine's Positionality

Katherine combines her artistic background with extensive experience in secondary boarding school and higher education enrollment. This experience has given her deep insights into the challenges and opportunities of educational institutions in competitive environments. Understanding the complexities of competing priorities and advocating for different cohorts has been paramount to her experience having led teams both big and small.

Edith's Positionality

Edie's background as a veteran teacher and administrator in independent boarding schools is augmented by her complementary roles as a boarding school alumna and parent of two children currently attending independent boarding schools. Her professional expertise includes strategic planning, relational leadership, program evaluation, and organizational systems, with a specialty on the longitudinal change dynamics in the New England boarding school market.

Katie Louise's Positionality

In complement to Edie and Katherine, Katie Louise holds extensive experience in public school leadership, primarily at the elementary principal level. However, her recent exposure to elements of district-wide leadership, including her work on professional pathways and capacity-building opportunities, affords additional perspective.

Articulation of the Problem

As a small-scale, volunteer-driven, resource-scarce, and seasonally focused professional organization, SBSA faces challenges achieving its stated mission and operationalizing its purpose:

Mission

The Small Boarding School Association establishes a forum for personal and professional dialogue, which promotes and supports small boarding schools (SBSA, n.d.).

Purpose

While the membership in the organization has grown since its founding, its central purpose remains essentially unchanged. SBSA continues to exist today to provide those who work in and with small boarding schools of various types an opportunity to share and to learn from one another. As such, the annual conference is the centerpiece of the organization and is the primary reason most schools and consultants join SBSA. Held each spring on the campus of a member school, the SBSA conference has developed a reputation as many people's favorite among all the conferences they attend each year. What makes this conference so attractive is its informality and its opportunities for sharing and collaborating. Attendees come prepared not to listen passively to a host of experts speak, but to actively participate in discussions whose topics are generated by the attendees themselves. They don't have to find time between sessions to have meaningful conversations with their friends and colleagues; those conversations are the conference (SBSA, n.d.).

The internal difficulties include effective service delivery, internal governance and operations, planning the annual conference, conducting strategic decision-making, and a surplus of SBSA leaders and members entering retirement. Externally, the shifting landscape of independent education as related to rising costs, pressures to expand school programming, and competition for students due to the "enrollment cliff", i.e., North America's declining birthrate over the past 20 years, are examples of the threats facing the different member categories. These

challenges complicate the overall efficacy of SBSA's coordinated efforts toward achieving its mission.

Therefore, a core problem emerges: SBSA struggles to maintain relevance and viability in an increasingly competitive and resource-constrained environment. Compounded by the limitations present in the volunteer-driven structure, the association's ability to envision and communicate robust, strategic initiatives necessary for adaptive and proactive governance is reduced. The association must find a way to empower its structural and operational capacities to more effectively engage and support its membership, and to ensure its continuation in the face of evolving educational demands and economic pressures.

Purpose Statement

This project aims to assist SBSA during a moment of self-identified organizational inflection with a strategic review of its value proposition.

While the team did not conduct a formal and thorough program evaluation, it utilized some of the tools of evaluation, including stakeholder engagement and a data collection plan. By employing improvement science methodologies, the team seeks to analyze SBSA's culture, offerings, structures, and systems to provide recommendations about alignment with the evolving needs of its community of members in support of enhanced organizational empowerment.

Review of Literature

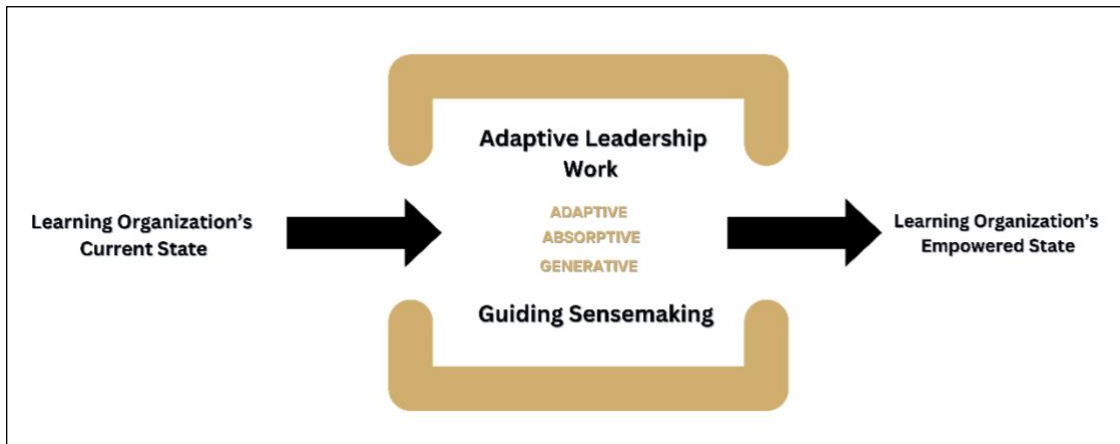
The delicate balance between the organizational past and the organizational present and future must be constantly recalibrated by organizational participants as they seek to construct, define, and justify what the organization is becoming (Golant et al., 2015, p. 627).

Introduction

Organizational empowerment intricately ties to the capacity of the organization to navigate and strategically respond to dynamic challenges (Zahra & George, 2002; Zott, 2003). This improvement project leverages a conceptual framework of adaptive leadership as a structured pathway for SBSA, a learning organization, to engage in sensemaking regarding the extent to which SBSA’s value proposition empowers the organization, as illustrated by Figure 1. Adaptation, both biologically and organizationally, involves a change. Within that change, the characteristics of an organization will no longer be true of its new evolution. This framework positions the organization for improvement by enhancing its agility in understanding, adapting to, and effectively communicating its unique value in the ever-evolving educational landscape.

Figure 1

Adaptive Leadership Work Conceptual Framework



Note. Original design inspired by Lewin (1948). Field theory.; Scheele, P. R. (2019, January 8). Adaptive Leadership & Resilience - Part 2. Scheele Learning Systems.; Weick (2005).

Learning organizations encounter adaptive challenges due to the constantly shifting needs of the communities they serve. The concept of adaptive challenges requires shifts in values, attitudes, and behaviors, which can be particularly demanding for learning organizations with diverse stakeholders and inclusive membership. Adapting to the evolving landscape, while

maintaining alignment with the stated value proposition, necessitates intentional and strategic leadership. Successfully navigating adaptive challenges also requires a commitment to learning, collaboration, and change, and a willingness to embrace innovation.

Introducing Adaptive Leadership as the Key Conceptual Framework

Adaptive leadership, as presented by Heifetz, Linsky, and Grashow (2009), holds relevance for SBSA. The authors describe a leadership model emphasizing flexibility, learning, and responsiveness in complex and dynamic environments, thus creating a crucial framework for organizations like SBSA. Adaptive leadership encourages leaders to navigate challenges in innovative ways by fostering a culture of continuous learning and adaptation (Heifetz, Linsky, & Grashow, 2009).

Castillo and Trinh (2019) build on adaptive leadership and offer a comprehensive approach to addressing the dynamic challenges faced by organizations. The essential concepts of absorptive, adaptive, and generative capacities enrich an organization's strategic framework for navigating the complexities of the educational sector (Castillo & Trinh, 2019). These elements do not operate sequentially, but rather in conjunction with one another. Organizations can accelerate efficacy through the development of absorptive, adaptive, and generative capacities, which results in increased value for the organization. The framework highlights four distinct conditions under which organizations operate: volatility, uncertainty, complexity, and ambiguity ("V.U.C.A.") (Castillo & Trinh, 2019, p. 356).

Adaptive leadership harnesses openness, humility, and feedback to develop a deep understanding of an organization and its needs (Castillo & Trinh, 2019). Heifetz, Linsky, and Grashow's (2009) principles of adaptive leadership underscore the necessity for organizations to cultivate a leadership style that is facilitative, humble, and open to feedback, ensuring that the

organization can pivot effectively in response to new challenges and opportunities. This process often involves an enactment, selection, and retention cycle, which Weick describes as critical for navigating organizational changes (Weick, 1995). Initially, organizations identify potential shifts in priorities or focus through activities that highlight inconsistencies and ambiguities. The analysis process leads to a phase where new understandings are codified and selected, or existing understandings are reinforced, thereby fostering adaptive leadership and enhancing sensemaking—a concept further explored in the discussion regarding absorptive capacity.

Castillo and Trinh (2019) also outline three key steps in successfully navigating adaptive leadership. First, members of the leadership team must develop and demonstrate self-awareness and humility. This awareness results in a view of the strengths and weaknesses of the leadership team in relation to the entire organization (Castillo & Trinh, 2019).

Second, leadership team members must empower members and recognize individual and collective contributions to the organization (Castillo & Trinh, 2019). Roberson and Scott's (2022) scholarship on contributive justice is helpful in assessing an organization's current dynamics and outcomes in this realm. The extent to which there are provisions for meaningful work opportunities and instrumental voice to all members, regardless of their tenure or status, illustrates the presence of an inclusive and participatory environment, which is indicative of adaptive leadership (Roberson & Scott, 2022, p. 9). Roberson and Scott (2022) also provide additional indicators for the quality and depth of personal and professional dialogue within an association, particularly during specific events such as annual conferences or professional development offerings, that serve as a central platform for collaboration and knowledge exchange (Roberson & Scott, 2022, p 3). Adaptive leadership relies on open, honest, and productive communication, and these events are critical platforms for fostering such dialogue.

Finally, organizational leadership should demonstrate an openness to learning and an awareness of opportunities to expand understanding (Castillo & Trinh, 2019). Organizational openness results in the shared leadership of learning opportunities and priorities as a method for framing the organizational outcomes and strategic framework of the organization (Castillo & Trinh, 2019).

Absorptive Capacity

Building on the foundational work of Cohen and Levinthal (1990), who defined absorptive capacity as an organization's capacity to recognize, assimilate, and apply new knowledge, Castillo and Trinh (2019) use an integrated definition that highlights the concept's multidimensionality as a key contributor to organizational and leadership strategy. Three key elements of absorptive leadership—diversity of thought or experience, meaning-making, and slack—offer resources, such as time or capital, beyond what is immediately needed or perceived as beneficial by the organization (Castillo & Trinh, 2019). Further discussion on these three elements continues below.

This characterization of absorptive capacity is supported by an expanding body of literature. Zahra and George (2002) build upon Cohen and Levinthal's foundation (1990) and expand the model of absorptive capacity to explain how its presence affects the dynamic capabilities of organizations. Dynamic capability is the organization's ability to strategically reconfigure to address rapidly changing environments to achieve innovative forms of competitive advantage and institute organizational change (Teece et al., 1997; Castillo & Trinh, 2019). Dynamic capability enhances the organization's routines and processes related to absorptive capacity, specifically its ability to recognize, assimilate, and apply new knowledge, as well as to transform and exploit that knowledge for organizational innovation, flexibility, and

performance (Zahra & George, 2002). An organization's ability to transform and exploit new knowledge for innovation, flexibility, and increased performance underpins the extent to which absorptive capacity enhances a firm's dynamic capabilities (Zahra & George, 2002).

Additional research mentioned in Castillo and Trinh (2019) elaborates on and reconceptualizes Zahra and George's (2002) link between absorptive capacity, dynamic capabilities, and organizational change. Lane et al. (2006) draws a connection between an organization's performance, its absorptive capacity, and its ability to learn. Todorova and Durisin (2007) underscore the importance of power dynamics and social integration mechanisms, among other concepts, in the formulation of a firm's absorptive capacity.

Another consideration within absorptive leadership, diversification, expands the organization's ability to traverse nuanced and complex conditions (Castillo & Trinh, 2019). Diversification includes multiple dimensions, including age, worldview, location, ethnicity, and expertise of members within the organization. This variety of perspectives better aligns organizational leaders and decision-makers to external forces outside the organization. When organizations fail to diversify, or to consider diverse perspectives, the organizations become unable to recognize and adapt to new information or new contextual factors and risk irrelevance (Castillo & Trinh, 2019).

An additional element, slack (Castillo & Trinh, 2019), considers the tight and loose constraints of the organization; where does the organization have a little "give" or flexibility? Slack can encompass fiscal resources, human capital resources, tangible assets, and time. If there is slack in a resource, it represents an opportunity to utilize the resource in a new and different way. Organizations must exercise caution, however, as too much slack can result in tremendous

inefficiencies and significant decline in performance or intended outcomes (Castillo & Trinh, 2019).

The final factor in absorptive capacity, meaning making, or sensemaking, allows the organization to reconceptualize (Castillo & Trinh, 2019). Sensemaking, through communication, discussions, and shared experiences, fosters a shared identity of individuals within a similar context (Weick, 2005). Sensemaking, through ongoing socio-cognitive processes, creates new possibilities for the leaders and members of the organization (Castillo & Trinh, 2019). To ensure the sustainability and relevance of a large-scale adaptation, sensemaking regarding where the organization is currently, and the direction or change needed within the organization, must occur. Sensemaking fosters a shared identity and understanding of individuals within a similar context—in this case, an organization (Weick, 2005). The sensemaking process guides the decision-making of an organization's leadership and the empowerment of the members (Weick, 2005; Castillo & Trinh, 2019). With SBSA, engaging in a sensemaking process would guide the decision-making of the board leadership and the empowerment of the association's members. This process is particularly crucial in the SBSA context, where sensemaking could potentially shape the leadership's decisions and enhance the empowerment of its members, thus aligning with the organization's goals and challenges with adaptive leadership actions.

These varying definitions and process models of absorptive capacity underscore the continuously evolving nature of the concept. At its core, absorptive capacity relates to the factors that influence how an organization learns from its environment, whether through interactions with other organizations, research and development efforts, or changes in the marketplace. Absorptive capacity is crucial for learning organizations if they seek to continually innovate and adapt to their members' evolving needs and navigate in a VUCA environment.

Adaptive Capacity

In the context of adaptive capacity, Castillo and Trinh's discussion highlights the imperative for leaders, particularly within dynamic sectors like education, to evolve and more effectively align with their operational environments (2019). Adaptive capacity refers to the ability of leaders to modify procedures, adjust to new circumstances, and continually update their knowledge and skills to meet various situational demands. This capacity is especially critical in VUCA environments where organizational structures and employee dynamics are perpetually shifting.

Leaders often confront the paradox of maintaining consistency while demonstrating adaptability, a challenge compounded by entrenched cultural and psychological barriers. In the United States, leadership traditionally embodies steadfastness and consistency, with deviations or perceived inconsistencies often viewed negatively. This cultural paradigm elevates task accomplishment and casts leaders as nearly omnipotent figures, potentially inhibiting their willingness to seek feedback and adapt. Such resistance to change and feedback can precipitate organizational stagnation and squandered growth opportunities. Edgar Schein, in his seminal work *Organizational Culture and Leadership* (2010), discusses how leadership styles deeply influence organizational cultures and norms. His theories emphasize leadership's role in shaping these norms and values, which in turn influence the adaptability and responsiveness of organizations to environmental changes. This framework is crucial for understanding the challenges leaders face in balancing consistency with adaptability in complex cultural and psychological landscapes (Schein, 2010).

According to Yukl (2009), adaptive capacity demands a paradigm shift from traditional leadership roles towards more facilitative and supportive functions. The shift cultivates an

environment where questioning and interdependence are encouraged, aligning with Schein's (2013) advocacy for humble inquiry to build respectful and mutually beneficial relationships. By embracing vulnerability and recognizing their limitations, leaders can foster a learning culture and adaptability, essential for navigating the complexities of contemporary organizational landscapes.

For SBSA, enhancing adaptive capacity necessitates a redefinition of leadership roles to focus on supporting and facilitating. This transformation involves promoting humility among leaders, urging them to value continuous learning and adaptation as critical to organizational success in an unpredictable educational sector. Leaders should proactively seek feedback, engage in reflective practices, and encourage a culture where empowerment, collaboration, and recognition of others' contributions are paramount. Such a transformation not only bolsters the organization's agility but also ensures its long-term relevance and sustainability in a rapidly evolving educational environment.

Additionally, Senge (2006) posits that successful adaptive leadership in educational settings involves understanding the interconnectedness of various system components and utilizing this understanding to foster an inclusive and adaptive organizational culture. Integrating these principles can help SBSA leaders develop responsive and anticipatory strategies that reflect future educational challenges.

This shift in leadership approach will require ongoing support and development, as Kotter (2012) suggests, through structured leadership training programs that emphasize adaptive strategies and skills. By investing in such development programs, SBSA can equip its leaders to meet future challenges effectively, fostering an organizational ethos that thrives on change and continuous improvement.

Generative Capacity

Absorptive and adaptive leadership are imperative, but for continued sustainability and relevance, organizations must employ generative capacity (Castillo & Trinh, 2019). Generative capacity focuses on creating new opportunities and solutions that address emerging challenges. The generative approach allows organizations to look to the future, thus maintaining flexibility, to accommodate ever-changing internal and external conditions (Castillo & Trinh, 2019). For associations like SBSA, developing a generative capacity involves embracing design thinking and innovation to envision and actualize the future of boarding school education. This capacity will support the organization's strategic goal of adapting to and shaping the educational landscape.

The literature presents various facets of how organizations can cultivate and benefit from generative capacity, which requires structure and advance planning. Avital and Te'eni (2009) highlight the necessity of fostering an environment that encourages innovation through a two-pronged approach: actively innovating and creating affordances for ongoing innovation. In this framework, ideas can continuously evolve and be tested, and the approach is particularly suited to complex problems that are novel and do not fit into pre-existing categories or analytical frameworks, common in highly uncertain environments where traditional empirical data may be lacking. Regular innovation labs or hackathons, where educators, students, and external stakeholders collaborate to solve current challenges with novel educational tools and methodologies, is something that SBSA can explore.

Steinbruner (2002) further elucidates that a generative approach transcends conventional analysis and rationality, particularly in contexts devoid of clear empirical data, transforming uncertainty into a resource. This perspective is critical for SBSA as it navigates the complexities

of educational needs and societal expectations that do not always align with established educational models. Additionally, this forward-looking approach allows the organization to experiment with various outcomes and develop contingency plans that enhance its adaptive capacity; for SBSA, adopting scenario-planning techniques to anticipate future educational trends and develop multiple strategic responses may aid members.

As generative capacity inspires organizations to take an entrepreneurial approach, Sarasvathy's (2001) concept of effectuation is integral to understanding how generative capacity can be operationalized. Effectuation suggests that rather than positioning themselves to exploit existing opportunities, leaders should create new opportunities. Using available resources and networks to pilot new educational programs or collaboration models without waiting for extensive market research may serve the SBSA. This mindset shift from a causation to an effectuation approach involves using heuristics such as experimentation, novelty seeking, and taking calculated risks, which are particularly pertinent in dynamic and uncertain environments (Chandler et al., 2011). Drawing on the work of Chandler et al. (2011), SBSA can develop an ecosystem that supports and rewards risk-taking and innovation. Innovative environments provide the tools and resources necessary for experimentation and create a supportive policy framework that encourages trials and recognizes the learning value of failures.

The critical importance of generative capacity for organizations like SBSA is that it not only addresses current educational challenges but also proactively shapes the future of education. Enhancing generative capacity within SBSA extends beyond merely adopting new tools or processes; it involves cultivating a culture that embraces change, seeks innovation, and strategically prepares for future challenges. By integrating principles of innovation, flexibility, and strategic foresight into its core operations, SBSA can develop a robust framework to thrive

in the dynamic educational landscape, ensuring its long-term sustainability and relevance by deeply embedding these adaptive and forward-looking elements into its strategic planning and everyday practices.

Organizational and Individual Empowerment within Adaptation

Integrating absorptive, adaptive, and generative capacities within the adaptive leadership framework outlined by Heifetz, Linsky, and Grashow (2009) presents a comprehensive model for fostering organizational development and empowerment. This strategic synthesis amplifies SBSA's ability to remain agile and effectively understand, adapt, and communicate its distinct value amidst the rapidly changing educational sector. It also secures its ongoing relevance and impact. By leveraging the strengths of adaptive leadership and embedding the crucial elements of absorptive, adaptive, and generative capacities, as detailed by Castillo and Trinh (2019), this literature review elucidates a coherent strategy for achieving organizational empowerment and sustainability. Thus, it significantly broadens the theoretical foundations of adaptive leadership, offering a well-defined route for SBSA's continuous evolution and effective response to its dynamic challenges.

To further enhance organizational empowerment, it is essential to explore frameworks that operationalize these adaptive capacities in day-to-day management and strategic decision-making. Transitioning from the theoretical to the practical, the capstone team built upon this base by integrating Zimmerman's empowerment model (2000). Zimmerman focuses on the psychological, organizational, and community levels to detail how empowerment processes can fundamentally enhance decision-making and resource access within an organization. This model complements the previously discussed adaptive capacities by providing a structured approach to empowerment, which is both a method of action for an organization and an outcome for its

members (Ramos, et al., 2020). The synergy between collective sensemaking, as facilitated by adaptive leadership, and empowerment-driven actions significantly expands the scope of adaptation, magnifying the influence and effectiveness of organizational decision-making.

Francescato builds upon organizational empowerment theories by highlighting the importance of participatory methods in organizational assessments (Francescato et al., 2015). These perspectives synergize with the principles of futurist strategic planning, which advocate for anticipatory and adaptive strategies in organizational development (Webb, 2019). Integrating these theories provides a comprehensive approach for an organization to enhance its effectiveness and adaptability in the dynamic educational landscape.

Analysis of Governance Structures and Related Conceptual Frameworks

Organizational empowerment and adaptive leadership rely on the organization's context. For a non-profit organization, one key element of the organization is the governance framework. The governance framework of SBSA, as a compact, volunteer-led 501(c)(3) nonprofit, inherently presents both strengths and obstacles. This arrangement facilitates closer personal connections and potentially more agile decision-making, but it also introduces challenges in achieving equitable and inclusive governance.

Insights from Bruni-Bossio (2016) and Smith and Shen (1996) suggest that in such environments, longer-standing members may disproportionately influence decision-making, a tendency more evident in smaller organizations where personal relationships significantly influence operations. Variance in experience levels or tenure could result in more veteran leaders, in many cases board members (i.e., organizational leaders), developing a paternalistic view of the organization where status and experience result in increased voice or influence within the

organization (Wagstaff, et al., 2015). This paternalistic tendency could unduly influence an organization's ability to engage in generative thinking and encourage future adaptations.

This context underscores the importance, as highlighted by Besharov and Khurana (2015), of leadership's role in championing the organization's core values and objectives beyond mere operational efficiency. Leaders are charged with the vital task of ensuring the organization's mission aligns with its long-term viability and resonates within the larger community sphere, which aligns with generative and adaptive elements of abduction, evaluation, and seeking to understand. However, Besharov and Khurana (2015) also caution against the risk of prioritizing technical over ethical commitments, which could lead to an organization that, while successful in performance, might not fully align with broader societal values. This absorptive capacity focus illuminates the importance of diversification of ideas and perspectives and organizational meaning-making to ensure alignment with intended outcomes.

Furthermore, Ragnarsdóttir (2021) points to the challenges school leaders face in navigating an increasingly polarized environment when addressing significant systemic changes. This landscape emphasizes the need for a leadership approach that is not only cognizant of, but actively engages with, the complex dynamics at play to cultivate an organization that is both effective and morally aligned with wider community aspirations. This generative capacity-building ensures a future-focused organization with an understanding of the continually evolving culture of an organization and the ever-changing community within which the organization operates.

The essence of effective leadership within SBSA and similar organizations lies in balancing the technical with the ethical, ensuring that the organization not only thrives operationally but also maintains a moral alignment with the broader goals of society, thus

aligning with the generative and adaptive aspects of the conceptual framework. Diffusing power structures with many active volunteers increases member participation, and the absorptive capacity of the organization, but may result in reduced efficiency (Harris, 2011). At the same time, excessive formal policies and hierarchy can diminish absorptive capacity through reduced volunteer motivation (Smith & Shen, 1996). This balance is crucial for fostering an environment where the organization's value proposition is not just articulated but genuinely experienced by its members and reflected in its contributions to the community at large.

Thoughtful governance design is essential, and balancing member empowerment remains critical through shared leadership with functional structures and processes (Bruni-Bossio, 2016). Regular transitions and inclusive decision-making help mitigate issues like power differentials among veterans versus new members (Bruni-Bossio, 2016). A natural and unintentional bias forms within nonprofit governance toward founding individual members or member groups, which often results in an imbalance of power toward the veterans within the governing structures, thus reducing adaptive and absorptive leadership qualities (Bruni-Bossio, 2016). Implementation of key generative leadership strategies, such as balancing the capacity of the organization and continually refining excellence targets, can influence and help to eliminate power imbalances (Bruni-Bossio, 2016; Tsoukas, 2018). Constant recalibrating through meaning-making and sensemaking, with a focus on maintaining the institutional identity, remains key for maintaining an organization's absorptive capacity (Tsoukas, 2018).

Project Questions

Research Question 1: What is the perceived value of SBSA according to the leadership?

Research Question 2: What is the perceived value of SBSA according to the membership?

Research Question 3: What disparities exist between the leadership and the membership about the perceived value of the organization?

Project Design

This project utilized a mixed methods approach to data collection to provide a comprehensive depiction of the association and to triangulate findings to generate reliable insights. The complementarity of quantitative and qualitative data allowed for the exploration of broad patterns and individual experiences, enriching the capstone team's understanding of organizational dynamics and practices.

Prior to Internal Review Board approval, September 2023 through February 2024, the team held scoping meetings with three SBSA leaders to learn more deeply about SBSA to formulate draft project questions. Following IRB approval for a quality improvement project received on February 22, 2024, data collection commenced and proceeded through June 2024. The methods included observing the organization, interviews, surveys, a focus group, document analysis, and follow-up questions with the objective of capturing information relevant to the SBSA value proposition across multiple methods as indicated by Table 1. Interview protocols, coding development, and procedures are compiled in the Appendix.

Table 1*Data Collection Methods, Timeline, and Links to Conceptual Framework*

Data Source	Information Yield	Link to Conceptual Framework
Scoping Meetings September 2023- February 2024	Two (2) Zoom sessions and one (1) phone call were conducted with members of the SBSA board leadership group before the annual conference to build a general understanding of the organization and the annual conference event.	Sensemaking, organizational values, organizational priorities, learning organization identity, alignment with adaptive work, V.U.C.A. landscape.
Conference Data Collection March 24-27, 2024	The research team attended the annual conference hosted by Indian Spring School, Birmingham, AL. For each of the three days, the team administered a brief three question survey that attendees could opt into taking. Additionally, the team participated in informal (unscheduled) conversations with conference attendees.	Sensemaking, understanding complex situations meaningfully.
Document Analysis April-May 2024	Analysis of SBSA website, social media, bylaws, and historic conference materials from 2011- 2024.	Absorptive Leadership – including what is “tight” and what is “loose” within the organization.
Interviews April-May 2024	Individual interviews sought the perspective of the SBSA membership and extended sphere, including two board members (i.e., leaders), two heads of school, two enrollment faculty, two educational consultants, and two non-administrative faculty.	Adaptive Leadership, cultivating empowerment, collaboration, and recognition of contributions; Absorptive Leadership, discovering power dynamics and organizational slack; Generative Leadership, exploring new opportunities; Sensemaking, guiding decision making; organizational empowerment.
Survey May 2024	The survey includes three demographic questions; one multi-part (12 topics) Likert scale question; and one open-ended narrative question. The design of the survey is informed by the factors of adaptive leadership as stated by Heifetz, Linsky, and Grashow (2009) the definition of value proposition discovered from the extant literature, the Ravitch and Carl (2021) text, and the team’s experience working with independent schools, K-12 schools, and organizational leadership.	Adaptive Leadership, understanding interconnectedness; Generative Leadership, recognizing the need for new opportunities; Sensemaking to guide decision-making; Organizational Empowerment to respond to climate of sector and membership categories; Absorptive Capacity to respond to member needs.
Focus Group	One focus group will be conducted with educational consultants. The questions	Same as interviews.

May 2024	will mirror those used for individual interviews with some adaptations to allow for the group nature of the format; specifically, fewer questions will be deployed.	
Follow-Up Communication May-June 2024	Capstone team members asked follow-up and clarification questions of SBSA leaders via email.	Same as survey.

To ensure a comprehensive understanding of how SBSA aligns with the principles of adaptive leadership, the team developed a series of interview and survey questions informed by the conceptual framework. By capturing insights from members, the team can better assess SBSA’s current strategies and their effectiveness in meeting member needs, promoting professional development, and fostering an innovative and responsive organizational culture, all elements related to adaptive leadership work. Table 2 provides a sample of these questions and their connections to the conceptual framework. Lists of survey and interview questions are included in the Appendix.

Table 2

Sample Interview and Survey Questions with Links to Conceptual Framework

Question Type	Text	Link to Conceptual Framework
Interview Question	In what ways does SBSA membership enhance, or fail to enhance, your professional development or educational goals?	Generative Leadership: spotlighting the potential for professional advancement vis-a-vis SBSA membership.
Interview Question	Are SBSA’s programs and initiatives meeting member needs? Explain further.	Adaptive Capacity: assesses the impact of existing practices to meet situational demands of the membership.
Interview Question	Now that you’ve had a chance to reflect over the course of the interview, in your own words, what is the SBSA’s purpose and value?	Sensemaking: prompting the potential for reflective thinking about value proposition.
Survey Question	SBSA effectively adapts its strategies to meet the diverse needs of its members.	Adaptive Capacity: assesses the ability to modify procedures to meet situational demands of the membership.

Survey Question	SBSA is a forward-thinking organization.	Generative Leadership: spotlights the interest in the organization to plan for future needs and opportunities.
Survey Question	SBSA is receptive to member feedback/input.	Absorptive Capacity: assess the ability to recognize and apply new knowledge to meet the evolving needs of the membership.

Data Collection and Analysis

The project’s data collection and analysis aimed to understand the perceived value of SBSA through a mixed methods approach that involved qualitative data collection from document analysis, narrative survey responses, interviews, a focus group, observations, and quantitative data from four surveys. The team remained in communication with three SBSA board members throughout the data collection process, including contact for follow-up questions during the analysis and formulation of findings and recommendations.

Phase One

Before the annual SBSA conference, the capstone team conducted an analysis of the association’s key documents: the association’s bylaws (see Appendix F), historic conference materials, and the association’s website and social media, specifically Facebook and Instagram. The analysis aimed to identify SBSA’s foundational values, strategic goals, and operational structures. Additionally, the team held scoping meetings with three SBSA board members to gain deeper insights into the association, refine the project questions, and define the relevant terms for the project. The terms defined in Table 3 are a product of that preliminary work and inform a shared understanding of the information provided in this document and the corresponding deliverable.

Table 3

Definition of Terms

Term	Definition
Affiliates	For-profit or non-profit entities inclusive of educational partnership groups and non-profit educational organizations, excluding schools, who share an interest in the unique issues of small boarding schools. For the purpose of this project, this group will be referred to as “affiliates” or “affiliate members”.
Board of Trustees	The SBSA Board of Trustees is a group of volunteer leaders responsible for providing governance, strategic direction, and oversight to ensure that the organization fulfills its mission effectively and remains financially sustainable. The composition of this group, including election and term-limit information is outlined in the SBSA Bylaws. Currently, there are eleven (11) members of the Board of Trustees and one (1) Board of Trustee Emerita. For the purposes of this project, this group will be referred to as “board members,” “the leadership,” or “leaders”.
Educational Consultants	An educational consultant is a professional who provides personalized guidance and expertise to students and their parents/guardians in the navigation of educational choices, academic planning, and admissions processes.
Independent School	An independent school is a private educational institution that operates independent of government funding and curriculum requirements, often governed by a board of trustees and financed primarily through tuition, fees, and donations. An independent boarding school is a private educational institution, as described above, that provides both academic instruction and residential accommodation for students.
Member School Employee	Also sometimes termed as “faculty” or “potpourri faculty” by SBSA; refers to non-head of school and non-enrollment member schoolteachers or other instructional staff. Faculty could be responsible for delivering academic instruction, directing programs, coaching, advising, counseling, or serving in school leadership but not as a head of school.
Member	Member status and eligibility is determined by whether the school includes a boarding program with enrollment limited to near or below 200 students and is designed for students to complete a full academic year program. Schools with programs where enrollment is designed for partial, transitional, or temporary instruction are ineligible. The school must be designated as a not-for-profit/503(c)(3) organization and be accredited or be in the process of formal accreditation, by a recognized state, regional, or national accrediting agency. Educational consultants and agents of corporate affiliates are also eligible for membership. For the purposes of this project, the different classifications of membership will be organized as “member school employee” and “affiliate and educational consultant member”.
SBSA Annual Conference	An annual conference hosted on the campus of a member school traditionally in early spring. Registration is limited to 200 member attendees, including affiliates, educational consultants, member school employees, and SBSA leadership.

Phase Two

The research team attended the annual SBSA conference held at an association-member school, Indian Springs School, in Birmingham, Alabama, from March 25-27, 2024. During the three-day conference, the project team collected qualitative data through observations and informal conversations with attendees. Over 20 hours of observation included various settings and situations including conference breakout sessions, case-study activities, large group gatherings, and networking events such as meals and affinity group time. The observation protocol is included in Appendix A. The team was introduced at the conference's opening welcome session where the intention of their presence at the event was briefly explained. The team also operated a Vanderbilt-branded table at the event to inspire conversations and collect information from prospective interviewees. On each day of the conference, the team conducted a brief three-question survey through strategic placement of fliers and direct networking. These online surveys captured attendee feedback on various aspects of the event and offered an opportunity to self-select for an interview. Of the 200 conference attendees, 42 individuals participated in the survey on day one, 44 on day two, and 33 on day three, for a total of 119.

Phase Three

Following the conference, the team collected qualitative data through nine individual interviews and a focus group with four educational consultants as referenced by Table 4. This phase aimed to delve deeper into the experiences and perceptions of various membership stakeholders, including SBSA leaders, heads of schools, enrollment professionals, educational consultants, member school employees, and affiliate members. All participants volunteered, and the interviewers deployed the predetermined interview protocol consistently. Individual interviews took place on Zoom with a transcription feature to accurately capture the discussion.

One team member held the in-person focus group at the Independent Educational Consultant Association (IECA) conference in Connecticut. The session was recorded and transcribed.

Table 4

Interviews and Focus Group

Type	Total Participants (n=13)
Interview	
SBSA leaders (past or present)	3
head of school	2
member school employees	3
affiliate	1
Focus Group	
educational consultants	4

Concurrently, in May 2024, the SBSA board distributed a comprehensive survey to the complete SBSA mailing list, comprised of 1,300 current and former members inclusive of affiliates, educational consultants, member school employees, and members of the board of trustees via email, with one follow-up reminder email to prompt participation in the survey. The survey aimed to gather quantitative and qualitative data on the organization’s perceived value. Survey items included role-related questions, sector and association participation questions, Likert scale items, and open-ended questions designed to capture a wide range of member experiences and perceptions. The full survey is included in Appendix D. The team received 79 survey responses. One response was excluded because the respondent did not fit within the categories of member school employee, affiliate member, educational consultant, or SBSA leadership. Table 5 and Figures 2, 3, and 4 provide information about the composition of survey participants.

During the analysis of data, the decision was made to create two subcategories of members—member school employees and a combined category that includes affiliates and educational consultants. This decision allowed for greater granularity of data analysis within the

member group to identify those members who are currently working in a school setting from those who are not. It also afforded for the variability with which SBSA members colloquially use the term affiliate. The capstone team observed that some strictly abide by the definition of affiliate that appears in Table 3, while others use it as an umbrella term to describe affiliate and educational consultant members. In this report, both the specific member subgroups and the collective "membership" (i.e., member school employees plus affiliates and educational consultants) will be used. It will be specifically noted in instances when the collective membership is being referenced.

Table 5

May 2024 Survey Response Participation by Type

Participant Categories	Total Participants (n=78)
member school employees	45
affiliates and educational consultants	25
SBSA leaders (past or present)	8

Figure 2

Participant response data for May 2024 Survey question "How many years have you been professionally engaged in the small boarding school sector?"

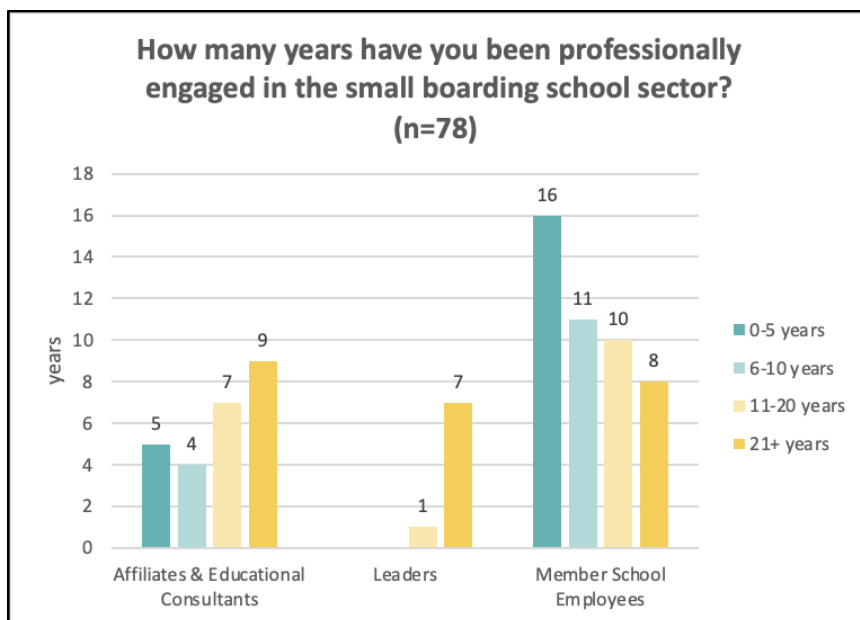


Figure 3

Participant response data for May 2024 Survey question “How often do you engage with SBSA?”

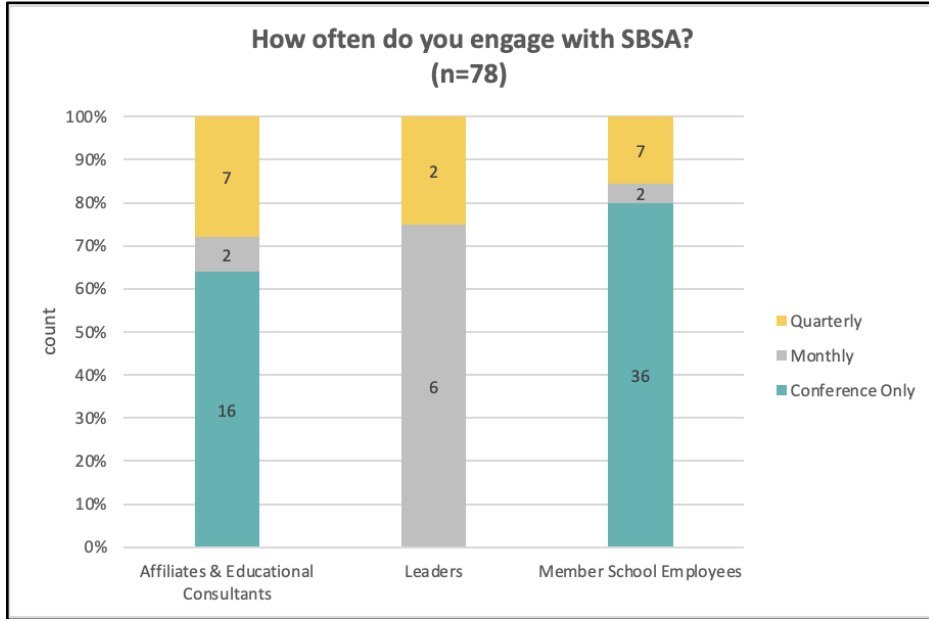
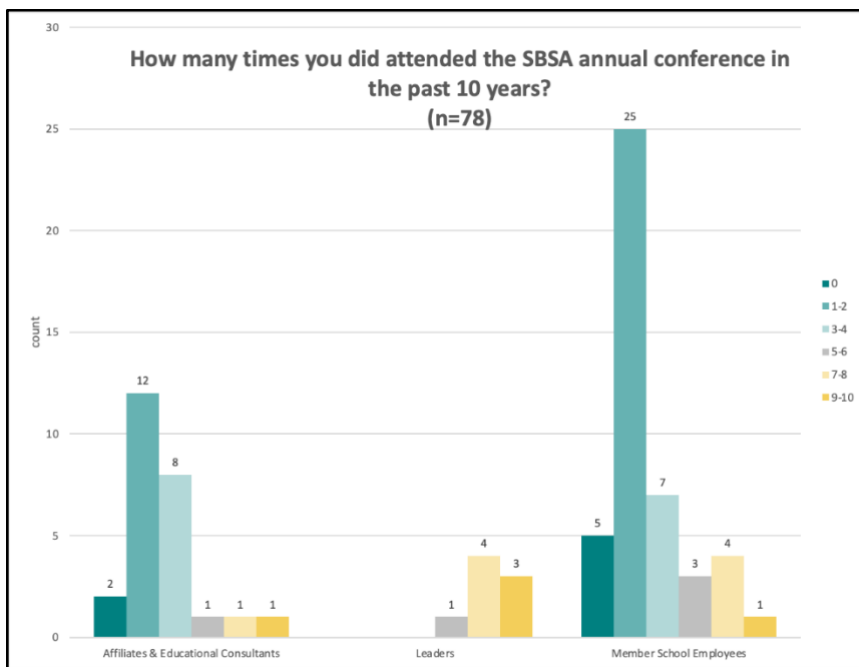


Figure 4

Participant response data for May 2024 Survey question “How many times did you attend the SBSA annual conference in the past 10 years?”



Quantitative data was analyzed using counts, means, and standard deviations to identify trends and patterns. Specific to this project’s Likert scale data, the team consulted with Dr. Marilyn Pelosi about the appropriate statistical methods to accurately interpret the ordinal, non-numeric, ranked responses. The decision to forego a full statistical analysis in favor of descriptive statistics and non-parametric methods was made as it is less prone to misinterpretation of Likert data.

Inductive thematic coding guided the analysis of the qualitative data from interviews, the focus group, and open-ended survey responses. The team identified key themes and categorized them according to the conceptual framework of adaptive, absorptive, and generative leadership capacities. From the initial analysis of the data, the team developed a codebook to delve deeper into how SBSA’s activities and leadership practices aligned with established theoretical frameworks and with the project’s conceptual framework. The team then analyzed the qualitative data a second and third time, with multiple team members reviewing each source and then connecting them with specific theoretical principles through tagging with appropriate terms. Table 6 contains a list of tags, descriptions, the connection to the conceptual framework, and examples. Additionally, a detailed explanation of coding practices appears in Appendix E.

Table 6

Code Book with Links to Conceptual Framework

Tag	Description	Connection to Conceptual Framework	Example
Collegiality	Activities, practices, or interventions promoting a sense of community, mutual respect, and collaboration among stakeholders within	Adaptive Leadership: Interconnectedness (Senge, 2006); Circular Behaviors (Follett, 1995).	<i>That (the annual conference) was a quantum leap for me in terms of connecting with other people. Understanding the common issues, you know, the things we’re wrestling with all of a sudden realizing that other people are</i>

	the small boarding school community.		<i>wrestling with the same as there's some comfort in that actually making some friends, some contacts.</i>
Networking	Interactions, initiatives, or programs aimed at developing connections and relationships among members of the Small Boarding School Association.	Adaptive Leadership: Interconnectedness (Senge, 2006)	<i>It opens a lot of doors in terms of opportunities for connecting with fellow small boarding school folks. And the ability to strengthen or create connections with educational consultants, which are for the (NAME REDACTED) school, the chief referral source.</i>
Adaptive Leadership	Instances of leadership characterized by the ability to adapt to changing circumstances, embrace uncertainty, and mobilize stakeholders to address complex challenges within small boarding schools.	Adaptive Leadership (Heifetz, Linsky, & Grashow, 2009); Reciprocal Adjustment (Follett, 1995).	<i>I think you need to let your imagination go and broaden the idea of the primary audience beyond just admissions to include school leadership, whether it's the head of school, board of trustees, or folks in student life and such. And, I think we are broadening that. How can we offer value to those folks?</i>
Generative Leadership	Leadership approaches that encourage innovation, creativity, and forward-thinking solutions to enhance the effectiveness and relevance of small boarding schools.	Generative Leadership (Heifetz, Linsky, & Grashow, 2009)	<i>To be very agile, we should be very much the incubators of creative ideas and student support services and those types of things. Not that all the things we'll be able to do are scalable, I get that. But we ought to be the ones that can quickly take current research or current needs and respond to them because we're so small.</i>
Stakeholder Engagement	Strategies and activities to involve and communicate with various stakeholders, including students, parents, staff, alumni, and community members, in decision-making processes within small boarding schools.	Adaptive Leadership: Recognizing individual and collective contributions (Castillo & Trinh, 2019; Roberson & Scott, 2022)	<i>And that's where I feel like SBSA is really good is that like, you know, he put aside a lot of the vendors and the agendas, and it's just all about, like, how can we work? How can we learn together from each other?</i>

VUCA	Volatile, Uncertain, Complex, Ambiguous; A concept describing the dynamic and challenging nature of modern environments characterized by rapid change, unpredictability, interconnectedness, and ambiguity.	Adaptive Leadership: Conditions of operation for all organizations (Castillo & Trinh, 2019). Law of Situation (Follett, 1995).	<i>There's probably going to be a bit of a crisis pretty soon because the head tenure is shrinking, and tuitions are rising.</i>
Sensemaking	The process of creating meaning and understanding from complex or fragmented information to navigate uncertain situations and make informed decisions.	Absorptive Leadership: Sensemaking as a form of Absorptive Capacity building (Weick, 2005)	<i>It's an environment where you can actually share ideas and thoughts and the community is supportive regardless. There's no judgement and I think that is key.</i>
Relational Leadership	Leadership approach emphasizing the importance of building and nurturing positive relationships, trust, and collaboration among constituents to achieve common goals and develop organizational effectiveness and resilience.	Adaptive Leadership: Yukl's (2009) focus on facilitative and supportive leadership through relationship building. Schein (2013) – humble inquiry.	<i>Having done this as long as I have professionally, I find myself mentoring other small boarding school professionals. Folks are turning to me for professional advice – which is both rewarding and fulfilling in and of itself.</i>

Lastly, during June 2024, follow-up communications with both SBSA leadership and membership were conducted over the telephone and via email when further clarification was necessary. In total, the follow-up process with SBSA leadership encompassed two phone calls and five emails.

Validity

To achieve research validity and reliability, the team employed an intentional variety of data sources, triangulation, and multiple coding (Ravitch & Carl, 2021, pp. 285-287). The multi-phase data collection plan aimed to enhance these aspects and ensure a comprehensive understanding. Bhattacharya (2017) notes that interviews provide high validity due to direct interaction, yielding nuanced and in-depth information. However, they are of low reliability because responses can vary due to changing perceptions or interviewer influence. Similarly, observations offer rich data but are subject to observer bias and can alter subject behavior, affecting reliability. While observations capture real-life interactions, maintaining consistent and unbiased observations is challenging. Surveys, by contrast, provide more reliable data with pre-defined responses (e.g., Likert scale questions) but lack the context of interviews and observations. To ensure transparency and reliability in data analysis, two or more team members independently coded the data. The team regularly met to discuss and resolve discrepancies and to address how individual and group positionality influenced the analysis. A log of decisions, coding procedures, and interpretations was kept, ensuring dependability and inter-coder reliability (Ravitch & Carl, 2021).

Two key assumptions underpinning this project are derived from observations and analyses within SBSA. First, the completely volunteer nature of SBSA's leadership results in limited capacity for special projects such as strategic planning, data collection, or governance redesign. This understanding comes from interviews and feedback highlighting the challenges faced in allocating time and resources due to the volunteer basis of leadership positions. Second, the small-scale nature of the association creates an increased focus on service delivery to members rather than broader advocacy for the small boarding school sector. This conclusion is

based on the operational priorities and activities of SBSA, reflecting the practical focus on providing immediate value and support to its members, as identified through member surveys, interviews, and analysis of SBSA's initiatives and programs.

Summary of Findings

As mentioned in the problem statement, the following findings address the core issue that the Small Boarding School Association struggles to maintain relevance and viability in an increasingly competitive and resource-constrained environment. The findings, along with the subsequent discussion and recommendations, highlight opportunities for the association to enhance its structural, operational, and collegial capacities. By leveraging adaptive, absorptive, and generative leadership, this learning organization can better support and empower members operating within a V.U.C.A. (volatile, uncertain, complex, and ambiguous) environment. This approach supports the work of Heifetz, Linsky and Grashow (2009) outlined within the conceptual framework by addressing SBSA's ability to adapt to the evolving education landscape while also sustaining alignment to its internal values and the strategic outlook sought by members and leaders alike.

Research Question 1

The first research question addressed how SBSA leadership perceived the value of the organization. Two findings emerged:

Finding 1: SBSA leaders value the association's profound commitment to cultivating collegiality.

Formal interviews and scoping conversations with current and former members of SBSA's leadership anchor this finding, as do team observations during the annual SBSA

conference, the narrative from the organization's website, responses to a Day Two Conference Survey question, and responses to the May 2024 Survey.

This finding is connected to principles of Heifetz, Linsky and Grashow's (2009) adaptive leadership model that stress how inclusion of, empathy towards, and understanding of multiple perspectives within an organization contributes, ultimately, to its empowerment. There is also a link to Roberson and Scott's (2022) principles of contributive justice that suggests that the recognition, fairness, and meaningfulness of an individual's contributions to dialogue requires a level of opportunity to engage in this type of collaborative action by the organization.

Throughout this project, members of SBSA's leadership shared how deeply they valued the meaningful, purposeful, and lasting professional relationships developed through membership with the association. This theme persisted from the earliest scoping meetings in September 2023 throughout the follow-up conversations in June 2024. Upon further interrogation and analysis of SBSA's focus on collegiality, specifically from the vantage point of a board member, the team uncovered that the organization's profound commitment was valuable for the all-volunteer leadership because it helped align their decision-making with the association's mission: "The Small Boarding School Association establishes a forum for personal and professional dialogue, which promotes and supports small boarding schools" (SBSA, n.d.).

SBSA celebrates that a focus on collegiality can be traced to the association's origins. Multiple leaders emphasized that SBSA valued and prioritized collegiality from its founding in 1987 with one leader specifically mentioning the "Our Purpose" statement on the association website:

While the membership in the organization has grown since its founding, its central purpose remains essentially unchanged. SBSA continues to exist today to provide those who work in and with small boarding schools of various types an opportunity to share and to learn from one another (SBSA, n.d.).

SBSA leaders shared stories of decades-long relationships borne from SBSA membership, both their own experiences and that of others; the capstone team also directly observed this phenomenon multiple times while working on this project. One example is from an informal conversation between a team member and the head of a member school, who also previously served on the SBSA board during the early 1990s. This individual shared how the relationships he formed over 30 years of SBSA membership were as meaningful as those he formed with his school's board of trustees and long-term colleagues. He also expressed appreciation for how SBSA's leaders made collegiality part of the "DNA" of the organization.

Association leaders explained that SBSA's focus on relationship-building was mission-critical because it generated multifaceted outcomes and rewards for the membership. Some examples of these outcomes include: building a more extensive peer group than is often available in members' home organizations; facilitating trusting connections between educational consultants and schools that result in enrollment of client families/students in small boarding schools; generating a more generalized feeling of connection across small boarding schools and within niche areas of the sector (e.g., junior boarding schools, therapeutic boarding schools, etc.); and making direct connections with third-party resources through the inclusion of affiliate members in the association. The leadership's perception of how SBSA's focus on collegiality forges mission-aligned outcomes for its members further reinforces the value that it assigns to this principle.

The current leadership group's value of SBSA's commitment to collegiality is also evident from the seriousness with which it actively stewards collaboration and the creation of space for dialogue. One SBSA leader articulated the following during an interview:

We can take those connections made and insights gleaned and extend the work we do for the rest of the school year. It opens a lot of doors in terms of opportunities for connecting with fellow small boarding school folks.

Another SBSA leader provided this response to the May 2024 Survey:

Members talk to each other differently than when they are talking to peers from big schools because they know they are facing their own versions of the same boarding school issues. We need to keep this up. SBSA provides space for those conversations.

The welcome remarks made by the SBSA President's at the 2024 annual conference specifically focused on the value of collegial connections and relationship building, "While our organization has grown, our core mission remains unchanged: to foster connection, community, sharing, and learning among those involved with small boarding schools of various kinds." These remarks align with the absorptive leadership strategies regarding gaining new knowledge to enhance organizational innovation, flexibility, and performance (Zahra & George, 2002). Playing a role in that work is a point of pride for SBSA leadership. The SBSA President shared that, "bringing people together through SBSA is top-of-the-list for the board."

Survey data from SBSA leaders further corroborates the president's characterization of the valuable role that collegial connection development plays for both the association and its leadership. The Day Two Conference Survey prompted, "*The purpose of SBSA is...*," and three of the four leader-provided free responses included "connection," "community," "peer relationships," and "collegiality," with 32 of the 40 responses from members (i.e., affiliates, educational consultants, and member school employees combined) containing the same or similar language (n=44).

The capstone team's attendance at the SBSA Annual Conference in March 2024 afforded approximately 20 hours of observational data that reinforced this finding. Conversations with a variety of association leaders produced a frequent refrain, that SBSA was "all about" building

relationships. It was viewed as being synonymous with the association's identity and purpose. As a result, the pursuit of collegiality frames the leadership's operational decision-making and a lens through which they validate results. As one leader shared, "Are people talking to each other? If so, that's a job well done by the planning group."

Leaders often cited the SBSA conference as tangible evidence of their commitment to building collegiality through the organization. The intentionally small size of the conference, capped at 200 participants, is viewed as directly supporting the goal of collegial connection. This sentiment appeared in the "additional thoughts" free response to the May 2024 Survey question, where one leader shared, "by keeping the conference small, we are able to connect with everyone we want to see each year." Leaders also attributed the conference selling out within a few weeks of registration opening, and the prevalence of repeat attendees, to the membership's interest in a collegially focused experience. Of the 78 respondents to the May 2024 Survey, 43.5 percent reported attending the annual SBSA conference three or more times since 2014, and 24.3 percent reported attending five or more times since 2014 (see Figure 4).

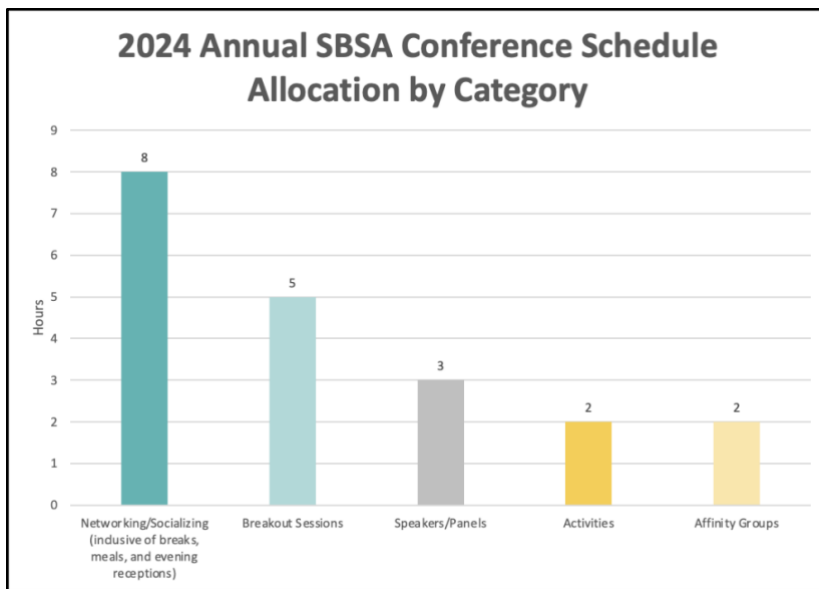
The leadership's vision of SBSA as a wellspring of collegiality is evident in their conference design. At the 2024 event, 40% of the schedule, or eight hours, was dedicated specifically to networking or socializing (see Figure 5). This allocation aligned with event schedules going back as far as 2011. These eight hours included three 30-minute "Break/Networking" periods, mealtime, and evening receptions (see Appendix G). The "Break/Networking" periods centered around the "Relaxation Station," a centrally located common area with snacks, comfortable seating, Wi-Fi, and air conditioning. One association leader highlighted the conference's focus on informal interactions, saying, "at the conference, you might be just chatting between sessions, and that's okay, but then I feel comfortable calling

you three months from now to see if one of my clients might be a good fit for your school.” This emphasis on genuine connections makes the conference feel less transactional and more authentic.

Conference registration also covered three daily cafeteria-style meals in the host school’s dining hall, promoting continuous conversation and remaining on campus throughout the event, and two evening receptions. Each evening, the receptions attracted 125-150 attendees out of 200, approximately 60%, fostering lively interactions as intended by SBSA leaders and observed by the capstone team. During these events, SBSA leaders were observed making introductions and actively circulating through the crowd to help facilitate conversations between members. On more than one occasion team members overheard leaders asking members to join them to meet a specific attendee and, in a few cases, the Vanderbilt team was on the receiving end of those introductions.

Figure 5

2024 SBSA Conference Schedule Allocation by Category and Hours



The intentionality of scheduling, with a focus on prioritizing networking throughout the conference, affords attendees the opportunity to engage in sensemaking with one another. As one member shared in a follow-up interview after the conference, “the total collegiality of the entire conference basically enabled me to do my job.” When this comment was shared with an SBSA leader for a reaction, they shared “this is exactly the goal of SBSA.”

This finding underscores the genuine belief of the leadership in the presence of and benefits from the collegiality created by SBSA, and the leaders’ direct contributions to this work. Furthermore, the process of sensemaking through participation, communication, sharing of common experiences, and connection through similar contexts strengthens elements of absorptive leadership within SBSA. Lastly, and in the context of the association having never embarked on a comprehensive, methodological reflection, this finding affirms the strength of this celebrated organizational value.

Finding 2: SBSA leaders value the annual conference as the essential engagement point for the association through which to understand and address the needs of the membership.

This finding links, again, to absorptive capacity and an ability for the organization to learn from others within the environment, primarily through interactions, to address SBSA member needs (Castillo & Trinh, 2019). In line with Finding 1, it substantiates the association’s beliefs with formal data that was previously unavailable. Increasingly, as reported by SBSA leadership and membership, member needs include addressing the volatility of school enrollment, the uncertainty of school finances, the complexity of programmatic decision-making, and the ambiguity of strategic impact, among others. Absorptive capacity plays a vital role in

enabling learning organizations, like SBSA, to continuously innovate, adapt to their members' changing needs, and navigate in a VUCA environment (Zahra & George, 2002).

Analysis of the association's mission, conference schedules from 2011-2024, formal interviews and scoping conversations with SBSA leaders, and team observations during the annual SBSA conference underpin this finding, as do results from two questions included in the Day Two Conference Survey and two questions from the Day Three Conference Survey.

The original and unaltered mission of SBSA is to “establish a forum for personal and professional dialogue, which promotes and supports small boarding schools” (SBSA, n.d.). When asked, the SBSA leaders confirmed that the forum in question is the annual conference. Throughout the scoping, formal interview, and informal conversations that were part of this project, the leaders frequently spoke about the annual conference's importance and value. In an interview, a leader shared the following:

The chief program of SBSA is the conference. The conference, I think, is highly regarded, and I think it is very effective. I get a lot of anecdotal feedback of how much people value it. In fact, I was at a conference last week, and some folks who attended the conference at Indian Springs confirmed that it is an important event for them.

Three of the four SBSA leaders who participated in the Day Two Conference survey further affirmed the centrality and value of the annual conference for the leadership through their free responses to the following two prompts, “*The purpose of SBSA is...*” and “*How does SBSA support innovation for small boarding schools?*”:

The conference is how I contribute to SBSA as a board member. Putting on a great event is my job.

The conference, hands down, is the most important way we support innovation.

The purpose of SBSA is to put on a quality event that excites the members about their work.

On multiple occasions, SBSA leaders expressed the importance of the annual conference as a dedicated space for small-boarding-school-specific learning. Per the SBSA website FAQ section entitled, “*Why should I attend the SBSA conference?*”, the association articulates, “From engaging keynote speakers to breakout and chat sessions on myriad topics, there is ample opportunity to dig deeply into themes of personal and professional interest.” (SBSA, n.d.). During an interview, one leader shared that the annual conference is a “place for us to focus on our specific needs as small schools.”

The conference’s schedule, planned by the association leadership, contributes to this goal by providing highly engaging and sector-relevant professional development programming primarily through breakout sessions. Session offerings are developed from member feedback and proposals, with leaders selecting those topics deemed high value within the small boarding school sector. During the 2024 conference, breakout sessions were allocated the second greatest amount of time in the schedule, five hours, or 25 percent, of the total time available at the event (see Figure 5). As one leader shared, “breakout sessions anchor the conference in hands-on learning that you can take back to your school.” The 2024 conference included 26 unique breakout sessions with the following categories and counts: Enrollment (10); Student Life (9); Academics (4); Miscellaneous (3). The following are specific examples of breakout session topics included for the 2024 conference:

One Admission Staff Member Down, Four Student Interns Up: Is It Working? (Enrollment)

Admissions and Marketing Strategies to Boost Enrollment (Enrollment)

“But... Why?”: A Comprehensive Approach to Incorporate Restorative Practices into Student Conduct and Discipline (Student Life)

Screen-Free Living Leads to Stress-Free Learning (Student Life)

Working Together Against Anxiety: Partnering Academic and Social/Emotional Supports in a Boarding School Environment (Academics)

From Setback to Success: The Power of Summer School in Rebuilding Lost Learning (Academics)

How To Talk So Your Diverse Parents Will Listen (Miscellaneous)

Pivoting All That Potential - And The Parents, Too (Miscellaneous)

A sampling of previous conference schedules reflected a similar scope of breakout session topics:

Therapeutic to Traditional Transitions: A Best Practices Proposal (2011)

Managing Sexual Misconduct (2012)

Admission Evolution: Admission as Leadership (2014)

Engage, Attract, Recruit, and Cultivate in a Digital Age (2016)

Supporting Student's Gender Journeys (2017)

Economics of Individual and Collective Schools (2019)

Fostering Productive Parent Relationships (2022)

Attending breakout sessions was part of the capstone team's conference observations.

Sessions were well attended, often standing room only, and were focused on participants engaging in conversation with the facilitator and members of the audience and asking questions.

A spirit of collegiality and the open exchange of information framed the work that occurred in breakout sessions, with presenters often explicitly encouraging this engagement strategy as an introduction to their topic.

Supplementing the breakout sessions, the conference's keynote speakers, and general sessions, including panels and full-group activities, also serve to address the conditions facing the small boarding school sector, albeit in a larger format. The 2024 conference did not include a keynote speaker as part of the schedule, but previous schedules included the following keynote speakers:

Karlo Young, general manager of 2U, Inc. (2022)

Marjorie Munroe, Professor, HubSpot Digital Platforms (2019)

Dr. Robert Sapolsky, stress expert, and neurobiologist, “Why Zebras Don’t Get Ulcers: Stress and the Brain” (2016).

Dr. Christopher Thurber, educational psychologist, “The Unlikely Art of Parental Pressure: A Positive Approach to Pushing Your Child to be Their Best Self” (2015).

Dr. Sharon Saline, clinical and adolescent psychologist, "What were you thinking? Understanding the teen brain" (2013).

Dr. Bernie Dunlap, former president of Wofford College (SC), “Communities of Larger Purpose” (2011).

For 2024, in lieu of the keynote speaker, the conference included a panel discussion about the evolving work of educational consultants and a group activity for all participants titled, “*Have You Ever? An All-Conference Event where small groups problem-solve challenging scenarios.*” The activity utilized teams from across the different SBSA Affinity Groups (i.e., enrollment, student life, head of school, affiliates, and educational consultants) to address case studies borne from real-life experiences at member schools. This activity resulted in a cross-cohort dialogue and brainstorming session about solutions, as well as blind spots, stressors, and diverging philosophies.

The following are examples of the case studies used in this activity: *Technological Adaptation in Education: How to implement a new LMS in a neurodivergent school population* and *The Unpopular School: innovative marketing and outreach strategies could the school implement to reverse the trend of declining enrollment due to a recent PR crisis.* In both cases, diverse groups of members worked together to create joint solutions that were later distributed to all conference attendees in the post-conference resource email. It was the first time since 2020 that the annual conference included this type of case study activity in the schedule. SBSA leaders

shared that including this activity was based on positive member feedback and a desire to create space to address issues not featured in breakout session offerings.

The examples and data described within this finding demonstrate how SBSA leadership values the annual conference, especially for its capacity to address current and future member challenges. The success of this strategy is evident from the responses to the Day Three Conference survey where 32 out of 33 respondents indicated “absolutely yes” to the question, “*Did you learn something at the conference that you will bring back to your organization?*” (see Appendix H).

These elements of adaptive leadership illustrate this learning organization’s intent to support the membership in continuous improvement. SBSA constructs this approach with risk-taking, trying new combinations of speakers, activities, and various topics for breakout sessions (Chandler et al., 2011). Among the 2011-2024 conference schedules available for review, there was significant variability in topics and an expansion of categories beyond enrollment and leadership to include sub-topics for student life, such as gender studies, faculty training, athletics, and more. The additional step this data section does not yet support is the shift from adaptive to generative leadership to fully embrace innovative thinking and risk-taking (Sarasvathy, 2001).

Research Question 2

The second research question addresses the membership’s perceived value of the organization. One finding emerged:

Finding 3: SBSA members highly value the association’s open and informed culture, as it fosters a trusting environment conducive to genuine discussions about individual, organizational, and sector-wide challenges.

This finding supports Tsoukas’s research (2018) and the reminder for organizations to continually recalibrate and sense-make while remaining true to their values and identity. The absorptive strategy allows learning organizations like SBSA to facilitate information-gathering throughout the learning community. The subsequent actions and insights resulting from the feedback generate proactive opportunities for adaptive leadership (Shein, 2010).

Responses to three questions on the May 2024 Survey, three different conference survey questions, team observations during the 2024 annual SBSA conference, formal interviews with SBSA members, and the May 2024 focus group support this finding.

Responses to three prompts included in the May 2024 Survey (n=78) contribute to this finding. First, “*SBSA fosters a culture of learning and knowledge-sharing among its members,*” where 45.8 percent of affiliate and educational consultant respondents (n=24) and 46.7 percent of member school employee respondents (n=45) indicated that they “strongly agreed” with the statement as seen in Table 7. Second, “*SBSA understands the landscape and realities facing its members,*” where, again, 45.8 percent of affiliate and educational consultant respondents and 42.2 percent of member school employee respondents indicated that they “strongly agreed” with the statement as seen in Table 8. Third, “*SBSA is well-versed in the latest knowledge related to independent school education,*” where 41.7 percent of affiliate and educational consultant respondents and 40.0 percent of member school employee respondents indicated that they “strongly agreed” with the statement as seen in Table 9.

Additionally, the associated Likert data for these three questions scored the highest of the survey’s twelve Likert questions (see Appendix D) with mean scores over 4.0, and the standard deviation of responses to these three questions averaged 1.0 for affiliates and educational

consultant respondents and 0.86 for member school employee respondents, showing some mild variability in the data that is not overly high (see Tables 7-9).

Table 7

Results for “SBSA fosters a culture of learning and knowledge-sharing among its members.”

	Strongly Disagree	Disagree	Neutral	Agree	Strongly Agree	Mean	Standard Deviation
Affiliates & Educational Consultant (n=24)	4.17%		8.33%	41.67%	45.83%	4.25	0.94
Leaders (n=8)				12.50%	87.50%	4.88	0.35
Member School Employees (n=45)	2.22%	2.22%	8.89%	40.00%	46.67%	4.27	0.89

Table 8

Results for “SBSA understands the landscape and realities facing its members.”

	Strongly Disagree	Disagree	Neutral	Agree	Strongly Agree	Mean	Standard Deviation
Affiliates & Educational Consultant (n=24)	4.17%		20.83%	29.17%	45.83%	4.13	1.03
Leaders (n=8)				25.00%	75.00%	4.75	0.46
Member School Employees (n=45)	2.22%		11.11%	44.44%	42.22%	4.24	0.83

Table 9

Results for “SBSA is well-versed in the latest knowledge related to independent school education.”

	Strongly Disagree	Disagree	Neutral	Agree	Strongly Agree	Mean	Standard Deviation
Affiliates & Educational Consultant (n=24)	4.17%		20.83%	33.33%	41.67%	4.08	1.02
Leaders (n=8)				25.00%	75.00%	4.75	0.46
Member School Employees (n=45)	2.22%		15.56%	42.22%	40.00%	4.18	0.86

Additionally, member responses to the Day One Conference Survey question, “*What motivated you to attend the conference?*” resulted in 55.0 percent (22) of the 40 member respondents (i.e., the combined responses of affiliates, educational consultants, and member

school employees) (n=42) including “learning,” “sharing,” or “connecting” in their free responses, further underscoring the membership’s perception of SBSA as an organization with a culture that values openness and information. Member responses to the Day Two Conference Survey prompt, “*The Purpose of SBSA is...*” further highlight this perception, with member responses including themes of open and informed exchange such as “to ensure their future by close collaboration, and sharing of best practices;” “to create a usable community;” and “give an opportunity for people to have others to speak with that have a similar enrollment.” Lastly, the Day Three Conference Survey question, “*Did you learn something at the conference that you will bring back to your organization?*” yielded replies in which 31 of a total of 32 members indicated “absolutely yes” (n=33) (see Appendix H). From these survey questions, the member perspective appears to identify value in SBSA’s promotion of the open exchange of information.

Formal interviews and the focus group conducted during May 2024 provided further explication of the membership’s value of the organization’s open and informed culture. A compilation of excerpts from those interviews includes the following:

That’s where I feel like SBSA is really good, they put aside a lot of the vendors and the agendas, and it’s just all about, like, how can we work together? How can we learn together from each other?

I think just having a place to, you know, open and honestly talk about what’s going on in your individual school or the challenges that you face is extremely valuable. And I think that there’s not always the same in other conferences, for what for whatever reason.

It’s worth being a member, particularly if you have a very small boarding population because you pick up valuable tips, and sometimes there’s things that you haven’t thought about that you can take back to your school and help improve the service and the lives that you work with.

It allows for not only great networking, but also I think, some healthy dialogue, communication, especially the smaller groups, the breakout sessions. I also thought the end was pretty interesting work, they opened up the floor to almost like, “hey, what topics are also here?”

The culture of openness and information exchange also extends to one-to-one member interactions. A frequent refrain during the capstone team's conference observations, which was backed up by interview data, relayed the perceived ability to reach out to SBSA colleagues with questions, and ideas, or to just *talk shop*, with a belief that a call, text, or email will be returned.

A compilation of excerpts from those interviews contains the following comments:

I've been reaching out to those new people I've met. I've been reaching out to them regularly just to say hi, you know, because I'm trying to build that sense of connectivity with people that do our same work.

My SBSA friends were the ones that taught me how to read an SSAT and an application. All of that knowledge came through the folks that I met at SBSA who very quickly became my phone-a-friend type of people.

I don't know what it is, it's like there's a sense of trust and collaboration that is different with SBSA. Maybe it's because they've said that up front as an expectation, but for whatever reason it's always been that way.

SBSA helps me meet great people who understand where I am coming from and the work I'm doing back at my school.

The interactions outlined within this finding demonstrate that elements of the adaptive leadership framework are present within SBSA as evidenced by the membership's acknowledgment of the new, open, genuine, and collaborative interactions they are willing to engage in vis-a-vis the association. This impression aligns with Heifetz, Linsky, and Grashow's (2009) emphasis on adaptive leadership cultures being forged when individuals are encouraged to take risks, working together to address complex topics, such as, in this case, the collective work of the shifting and VUCA landscape of the small boarding school sector. Additionally, SBSA member acknowledgement of and appreciation for the SBSA environment as knowledgeable, trustworthy, and welcoming of diverse perspectives further underscores the connection to the adaptive leadership framework, specifically stakeholder engagement and contributive

justice (Roberson & Scott, 2022). Lastly, like Finding 1 and Finding 2, this finding affirms what the association had long suspected but lacked formal data to support.

Research Question 3

The third research question posed what disparities exist between the leaders' and membership's perceptions regarding the value of the organization. One finding emerged:

Finding 4: The differing views between the leadership and membership regarding SBSA's responsiveness—its capacity for innovation, adaptability, and feedback—reveals a disparity in how each group perceives the association's value.

As Schein (2010) reminds scholars, organizations face a paradox in attempting to balance demonstrating adaptability and maintaining consistency. The difference in views between the association's members and leadership could result in organizational stagnation which relates to the ambiguity aspect of V.U.C.A. (Castillo & Trinh, 2019). Responses to four different questions on the May 2024 Survey, formal interviews with SBSA leaders and members, and the May 2024 focus group support this finding.

In response to the May 2024 Survey prompt, "*SBSA promotes a culture of innovation among its members,*" 62.5 percent of leaders (n=8) answered that they "strongly agree" with the statement, whereas 25.0 percent of affiliate and educational consultant respondents (n=24) and 20.0 percent of member school employee respondents (n=45) indicated that they "strongly agreed" with the statement as seen in Table 10. To the prompt, "*SBSA effectively adapts its strategies to meet the diverse needs of its members,*" 37.5 percent of the leadership, 33.3 percent of affiliates and educational consultants, and 17.8 percent of member school employee respondents indicated that they "strongly agreed" with the statement as seen in Table 11.

From this data, it appears that most of the leadership strongly believes that SBSA promotes a culture of innovation. At the same time, only a quarter of affiliates and educational consultants, and even fewer member school employees, share this sentiment, indicating a divide in perception between leadership and the broader membership. Correspondingly, while leadership is more confident in SBSA’s ability to adapt to member needs, this confidence is less reflected among affiliates, educational consultants, and member school employees, with many expressing uncertainties or a lack of visibility into SBSA’s adaptive strategies. This feedback points to a potential communication gap or a need for more inclusive engagement strategies to align perceptions across all stakeholder groups.

Table 10

Results for “SBSA promotes a culture of innovation to its members.”

	Strongly Disagree	Disagree	Neutral	Agree	Strongly Agree	Mean	Standard Deviation
Affiliates & Educational Consultant (n=24)	4.17%		33.33%	37.50%	25.00%	3.79	0.98
Leaders (n=8)			12.50%	25.00%	62.50%	4.50	0.76
Member School Employees (n=45)	2.22%	2.22%	24.44%	51.11%	20.00%	3.84	0.85

Table 11

Results for “SBSA effectively adapts its strategies to meet the diverse needs of its members.”

	Strongly Disagree	Disagree	Neutral	Agree	Strongly Agree	Mean	Standard Deviation
Affiliates & Educational Consultants (n=24)	4.17%	4.17%	20.83%	37.50%	33.33%	3.92	1.06
Leaders (n=8)				62.50%	37.50%	4.38	0.52
Member School Employees (n=45)	2.22%	2.22%	28.89%	48.89%	17.78%	3.78	0.85

Similarly, in response to the May 2024 Survey prompt, “SBSA is receptive to member input/feedback,” 75 percent of the leadership, 45.8 percent of affiliates and educational

consultants, and 33.3 percent of member school employee respondents indicated that they “strongly agreed” with the statement as seen in Table 12. And, lastly, responses to the statement, “SBSA effectively addresses the unique challenges and needs of its members” resulted in 50 percent of the leadership, 33.3 percent of affiliates and educational consultants, and 22.2 percent of member school employee respondents indicating that they “strongly agreed” with the statement as seen in Table 13. This second grouping of Likert question analysis reveals that while leadership sees SBSA as open to member ideas and effectively addresses the unique challenges of the membership, affiliates, educational consultants, and member school employees do not fully share this view.

Overall, the affiliate, educational consultant, and member school employee responses to these four questions also include a higher level of neutral and negative responses than the responses to the other eight Likert survey questions posed. Specifically, the Likert data for these 4 questions was among the lowest scoring of the survey’s 12 Likert questions, and the standard deviation of responses for these 4 questions averaged 1.02 for affiliates and educational consultant respondents and 0.91 for member school employee respondents, showing some mild variability in the data but consistent trends of less positive perception compared to leadership (see Tables 10, 11, 12, and 13).

Table 12

Results for “SBSA is receptive to members input/feedback.”

	Strongly Disagree	Disagree	Neutral	Agree	Strongly Agree	Mean	Standard Deviation
Affiliates & Educational Consultants (n=24)	4.17%		16.67%	33.33%	45.83%	4.17	1.01
Leaders (n=8)				25.00%	75.00%	4.75	0.46
Member School Employees (n=45)	2.22%	6.67%	24.44%	33.33%	33.33%	3.89	1.03

Table 13

Results for “SBSA effectively addresses the unique challenges and needs of its members.”

	Strongly Disagree	Disagree	Neutral	Agree	Strongly Agree	Mean	Standard Deviation
Affiliates & Educational Consultants (n=24)	4.17%		37.50%	25.00%	33.33%	3.83	1.05
Leaders (n=8)				50.00%	50.00%	4.50	0.53
Member School Employees (n=45)	2.22%	2.22%	35.56%	37.78%	22.22%	3.76	0.91

Formal interview data further illustrates this area of disconnection between SBSA leadership and membership. When asked if “SBSA programs were meeting the needs of members,” the three SBSA leaders interviewed shared, “I believe we are meeting needs;” “I think we are, and I think there are so many needs in the small boarding school environment right now that there is no end to the work that we could do;” and “I do, especially the conference.” In contrast, four (4) of the six (6) member responses during interviews revealed either negative or neutral perceptions, or a lack of certainty when asked the same question. Responses included the following comments:

I’m not sure. The conference appears to be the only way to get at that.

I don’t really know—mixed results according to my enrollment director.

I think that’s a tricky question in the sense that it can get very granular in many of the sessions and not always strategic, so perhaps there could be some additional work in that area by potentially getting in some more of the leadership of schools being able to participate.

I believe it has the potential to further expand its impact by strengthening its partnerships with other educational organizations. Why doesn’t TABS [(The Association of Boarding Schools)] pay more attention to them? It seems like a missed opportunity.

The May 2024 Focus Group with educational consultants yielded the following corroborating sentiments about a perceived lack of organizational responsiveness when asked a similarly scripted question about the ways that SBSA programs met, or did not meet, the needs

of members and, also, ways that SBSA membership enhanced or failed to enhance the professional development or educational goals of members. Focus group participants shared the following comments:

I think they definitely could do more. I think hosting tours, like the way the larger schools get together and have tours. They're very regional, too. I mean, they're on a smaller scale. So, I feel like people could network more. There's an opportunity.

This is a criticism; first-year members are not listed on that website yet. I think they need to go and update that website because, apparently, membership starts in March, and here we are in the month of May, and it hasn't been updated. I think it's been over a year since an update.

Additionally, during the focus group, several other members commented about the accuracy of the association's member list, the clarity of communication about what is included in the fee in terms of promotion, and to what extent member feedback was utilized in a specific and transparent manner.

In a similar vein to these interview excerpts, capstone team observations during scoping calls, the conference, formal interviews, and follow-up communications revealed a sense of satisfaction among the leadership about the association's responsiveness, or approach to responsiveness, to member needs and feedback. One leader, however, shared further details revealing a perception of association semi-stagnation:

I'll just be candid, I don't really see it growing or changing right now for the following reasons. We would need to hire staff, but the reason that SBSA is so successful in what it does now is that it's really inexpensive. So, we are stuck. Unless we have a bunch of retirees who are just willing to give us their time in a more robust way, most of us are in the phase of life where we're like mid-career. So, it would either require some really different board planning or the hiring of staff to make substantive improvements or to add beyond the conference for now.

Despite this comment, the leadership group repeatedly shared its strong sense of achievement about how the conference addressed the needs of the membership. During leadership interviews, when asked about potential plans to revisit, reflect upon, or redesign methods through which the

association responds to membership needs and provides feedback, the two action steps mentioned were the post-conference survey and the June board of trustees meeting.

Specific to the post-conference survey, the capstone team observed that its release was delayed by several weeks. Also, during a follow-up communication in early May 2024, an SBSA leader shared, without prompting, concerns about the response rate for the 2024 post-conference survey. When asked what would become of the data, the same leader replied that the trustees would likely review the information during the June 2024 board meeting; however, at that time, there was no apparent plan to share any results with the membership. When the capstone team asked for access to previous years of survey data, board meeting notes, and conference attendee rosters, the documents were not easily accessible, or in some cases locatable, and, therefore, were never obtained. These observations provide further insight into SBSA leadership's approach to organizational responsiveness and are evidence of the limitations that can be present in a volunteer-run learning organization.

The responsiveness-related disparity between SBSA leadership and membership presents an opportunity within adaptive leadership for increased membership feedback and involvement, and humble inquiry and reflection by the leadership (Heifetz, Linsky & Grashow, 2009; Schein, 2010; Schein, 2013). The lower scores from these groups on the Likert data coupled with more neutral-to-negative feedback during interviews and focus groups suggest potential uncertainty about, or a lack of visibility of, SBSA's efforts to be a responsive organization, indicating the potential existence of a communication gap or a need for more inclusive engagement strategies to better align perceptions across all stakeholder groups. Addressing these issues could enhance the perceived value of SBSA, ensuring that its innovation and adaptability are recognized and

appreciated by all members, thus creating opportunities for enhanced association empowerment (Zahra & George, 2002).

Discussion and Recommendations

The following discussion and recommendations aim to address the challenges identified in the data analysis and support the ongoing evolution, success, and empowerment of SBSA. Because of the organization's volunteer structure and resource constraints, implementing these recommendations requires, most importantly, a commitment and willingness to adapt. The adaptive leadership framework serves as the foundation, providing a robust approach to navigating the complexities of the VUCA educational landscape and fostering a culture of innovation, adaptability, and inclusivity. Findings show a disparity between leader and member perceptions of SBSA's innovation and adaptability. For instance, while 62.5 percent of organization leaders "strongly agree" that SBSA promotes a culture of innovation, only 20-25 percent of affiliates, educational consultants, and member school employees share this sentiment.

And, while SBSA leaders and members value their involvement with SBSA, there is a significant gap in perceptions regarding the organization's innovation, adaptability, and responsiveness. This disparity directly affects SBSA's perceived value and poses a threat to its relevance and viability. In the same manner, as it willingly embarked upon this capstone project partnership, SBSA should consider adopting a more adaptive leadership approach to align perceptions across stakeholder groups. Now is the time to adapt, absorb, and generate.

Recommendation 1: Revise the SBSA Value Proposition.

Given the identified need for greater responsiveness, inclusivity, and transparency outlined in Finding 4, explicitly listing the tools, resources, and networks that SBSA offers can enhance the perceived value and promote a more inclusive environment. Our data indicates high levels among all stakeholders of perceived value from the association's collegiality and organizational culture, and the benefits of the annual conference (see Findings 1-3). Building from these foundational attributes, there is the opportunity to address the increased feelings of neutrality expressed by the membership about how SBSA supports members in the VUCA environment of small boarding schools, especially with elements of innovation, adaptability, and addressing the unique challenges of the sector.

For example, while leaders and member school employees perceive SBSA as a forward-thinking organization, this perception is less strong among affiliates and educational consultants as seen in Table 14. This category of membership maintains important organizational and sector-wide pathways to areas including the student enrollment pipeline, third-party resource providers, and influence in national-level professional organizations such as The Association of Boarding Schools (TABS) and Independent Educational Consultants Association (IECA). An absence of clarity about the SBSA value proposition, or the association's ability to meaningfully respond to members' needs and perspectives, could result in a potential decline in membership over time of affiliates and educational consultants because they cease to see the organization's relevance within the crowded landscape of independent-school-focused professional associations. This category of membership is a primary draw for member school engagement, as it bolsters student enrollment through strong relationships with educational consultants and advertisers; thus, diminished membership among affiliates and educational consultants could precipitate a

reduction in other categories of membership. The corresponding and compounded effect on the association could be disempowering or, worse, ruinous.

Table 14

Results for “SBSA is a forward-thinking organization.”

	Strongly Disagree	Disagree	Neutral	Agree	Strongly Agree	Mean	Standard Deviation
Affiliates and Educational Consultants (n=24)	4.17%		33.33%	37.50%	25.00%	3.79	0.98
Leaders (n=8)			12.50%	25.00%	62.50%	4.50	0.76
Member School Employees (n=45)	2.22%		24.44%	37.78%	35.56%	4.04	0.90

To improve the perception of the association among all of its members, SBSA should revisit its value proposition to ensure that it aligns with the needs of all stakeholders and clearly articulates the benefits of SBSA membership. This effort should embrace language that indicates SBSA’s commitment to fostering adaptive, absorptive, and generative capacities within the organization:

- **Adaptive Capacity:** Enhancing SBSA’s ability to respond to changes and challenges in the educational landscape by promoting a culture of continuous learning and flexibility.
- **Absorptive Capacity:** Improving SBSA’s capability to recognize the value of new information, assimilate it, and apply it to achieve organizational goals.
- **Generative Capacity:** Encouraging innovation and the creation of new knowledge by leveraging diverse perspectives and fostering an environment where all members feel valued and included.

Prototype of Revised Value Proposition:

The Small Boarding School Association (SBSA) empowers member organizations by fostering a culture of innovation, adaptability, and inclusivity. We provide our members with the tools, resources, and networks that they need to navigate the complexities of the educational landscape and thrive in volatile, uncertain, complex, and ambiguous environments.

Ideas for developing these adaptive, absorptive, and generative capacities within SBSA lead to the next recommendation.

Recommendation 2: Promote Community Through Regional Meet-Ups.

To enhance SBSA’s emphasis on collegial connection, community, and networking, it should organize regional meet-ups throughout the year. These low-cost events will supplement the annual conference, providing greater opportunities for networking, relationship formation, coaching, and potential mentoring. By leveraging the association’s open and informed culture, as explained in Finding 3, the value associated with SBSA involvement, and the willingness to recommend the organization to others, as seen in Tables 15 and 16, these regional meet-ups can help develop a deeper sense of connection, network expansion, and relevance within the small boarding school sector without significant budget increases.

Table 15

Results for “I value my involvement with SBSA.”

	Strongly Disagree	Disagree	Neutral	Agree	Strongly Agree	Mean	Standard Deviation
Affiliates and Educational Consultants (n=24)	4.17%		4.17%	41.67%	50.00%	4.33	0.92
Leaders (n=8)					100.00%	5.00	0.00
Member School Employees (n=45)	2.22%		8.89%	40.00%	48.89%	4.33	0.83

Table 16

Results for “*I would recommend involvement with SBSA to a colleague in the small boarding school sector.*”

	Strongly Disagree	Disagree	Neutral	Agree	Strongly Agree	Mean	Standard Deviation
Affiliates and Educational Consultants (n=24)	4.17%	4.17%	4.17%	41.67%	45.83%	4.21	1.02
Leaders (n=8)					100.00%	5.00	0.00
Member School Employees (n=45)	2.22%	2.22%	2.22%	31.11%	62.22%	4.49	0.84

Through the interviews and survey data, membership responses reveal a need to create a structure where invested parties are leveraged and engaged more routinely than through just the annual conference (see Figure 3). To this end, Mary Parker Follett promotes the power generated in co-creation and construction, where the most powerful function of the leader involves encouraging increased leadership and ownership in other members within the organization (Follett, 1995). Follett encourages leaders to elevate different perspectives within the organization and foster creative integration to improve the organization (Follett, 1995). John Rawls builds upon this thinking to suggest that everyone has something unique to contribute, and highly effective leadership involves maximizing everyone’s potential and sense of being (Rawls, 1971). These elements support the components of the adaptive leadership framework mentioned within the literature review: fostering adaptive, absorptive, and generative capacities throughout the organization.

While there is demonstrated interest by the membership in more SBSA-sponsored professional development opportunities, there is also apprehension among members about serving as facilitators (see Tables 17 and 18). In addition to the time constraints experienced by many SBSA members from their roles in the small boarding school sector, this apprehension is perhaps due to the perception that there is little encouragement and support from SBSA

leadership for this work. Additionally, the current organizational culture is centered on infrequent, although robust, annual engagement (see Figure 3), at the conference (see Figure 4). This highly seasonal focus of SBSA might further contribute to this data point because members do not associate the organization with professional development offerings beyond the conference.

Table 17

Results for “*I would participate in SBSA-sponsored professional development programming outside of the annual conference.*”

	Strongly Disagree	Disagree	Neutral	Agree	Strongly Agree	Mean	Standard Deviation
Affiliates and Educational Consultants (n=24)	4.17%	4.17%	12.50%	37.50%	41.67%	4.08	1.06
Leaders (n=8)					100.00%	5.00	0.00
Member School Employees (n=45)	2.22%		6.67%	37.78%	53.33%	4.40	0.81

Table 18

Results for “*I would be willing to facilitate SBSA-sponsored professional development programming outside of the annual conference.*”

	Strongly Disagree	Disagree	Neutral	Agree	Strongly Agree	Mean	Standard Deviation
Affiliates and Educational Consultants (n=24)	8.33%	8.33%	25.00%	41.67%	16.67%	3.50	1.14
Leaders (n=8)		12.50%	12.50%	12.50%	62.50%	4.25	1.16
Member School Employees (n=45)	8.89%	17.78%	31.11%	20.00%	22.22%	3.29	1.25

To implement this recommendation, SBSA can design the meet-ups to resemble social events where hosts introduce new members to the group and give short talks about how the SBSA can serve as a platform for members to support one another. This approach aligns with the

general sentiment of value that members feel for SBSA and ensures that the events are both enjoyable and productive, encouraging continuous engagement and collaboration.

Meet-ups should be designed to be inclusive, welcoming all members and encouraging diverse participation, creating an atmosphere where all attendees feel valued and included. These events should be scheduled with the academic and professional conference calendar in mind, including the timing of the SBSA annual conference. These considerations suggest that aiming initially for one fall and one winter meet-up would be feasible. Additionally, ensuring these events are branded will enhance SBSA's visibility and address concerns from the affiliate and educational consultant group about how SBSA markets itself and promotes its members. Finally, it is necessary to evaluate and adjust the approach based on feedback. After each meet-up, gathering input from participants will help to assess the effectiveness of the event, using the feedback to make continuous improvements and ensure that future meet-ups respond to the needs and expectations of the membership. This format for collecting feedback would mirror the existing systems in place following the annual conference.

These meet-ups provide opportunities for building adaptive capacity as members to learn and adjust to new ideas and changes in the educational landscape. Facilitating the recognition, assimilation, and application of new knowledge gained through these interactions enhances absorptive capacity within the association. Encouraging innovation and the creation of new ideas through collaborative efforts fosters improved generative capacity for SBSA.

Roberson and Scott (2022) emphasize the importance of fostering a culture of inclusion, which is relevant here. By designing meet-ups that are inclusive and encourage diverse participation, SBSA can create a more welcoming environment for all members, which is critical for the organization's long-term success. This approach addresses the need for professional

development and helps build a stronger, more connected community within SBSA. Furthermore, creating a habit of regular engagement through these meet-ups can assist in establishing a new norm of continuous interaction and collaboration among members (Schein, 2010; Senge, 2006). Regularly participating in these meet-ups can also help to establish a new normal of ongoing interaction and collaboration among members. This strategy relates to the idea of “making routine activities more engaging and meaningful” (Carton, 2018; Chen, 2012). Tsoukas (2018) supports this continual recalibration and meaning making as critical for maintaining the organization’s absorptive capacity. By thoughtfully designing and implementing the recommended meet-ups, SBSA can create a sense of purpose and excitement, fostering a livelier and more dynamic organizational culture.

Opportunities for continued adaptive leadership advancements through expanding the association’s outreach and impact are outlined within recommendation three.

Recommendation 3: Enhance Association Visibility.

Finding 4 indicates a perception gap between the leadership and the broader membership regarding SBSA’s initiatives and strategic direction. The higher levels of neutrality and lower scores relative to others in the survey suggest that affiliates, educational consultants, and member school employees feel less certain or less positive about SBSA’s innovation, adaptability, and responsiveness to feedback and challenges. These areas represent opportunities for SBSA to improve communication and engagement strategies to better align perceptions across all stakeholder groups.

To bridge gaps and align perceptions across all stakeholder groups, SBSA should enhance its communication and visibility efforts by developing a comprehensive communication plan to update members regularly on initiatives, changes, and SBSA’s strategic direction. The

plan would also combat the perception that SBSA is a seasonally focused organization only interested in the annual ramp-up to the conference. Such a plan should utilize social media more effectively, maintain updated information on the website, and ensure conference materials are memorialized for marketing. Engaging with national-level organizations and hosting SBSA-branded sessions can also enhance the association's generative capacity by creating opportunities for innovation and collaboration. This alignment is crucial for effective adaptive leadership, as it enables the organization to navigate changes and challenges collectively (Castillo & Trinh, 2019).

By enhancing visibility and communication, SBSA can also foster a more inclusive environment that mitigates in-group behavior. Social Identity Theory demonstrates how in-group and out-group dynamics affect behavior and perception, potentially leading to a lack of diverse perspectives and discrimination against the out-group (Tajfel & Turner, 1979). Increased visibility ensures that all members, regardless of their group affiliation, have their contributions recognized and valued. Enhanced communication facilitates interactions between different groups, promoting a broader range of perspectives and collaborations. This approach aids in breaking down the barriers created by in-group and out-group dynamics, encouraging a culture of inclusivity and mutual respect within the association. As a result, SBSA can leverage all its members' diverse strengths and ideas, leading to more innovative and effective solutions to the challenges facing small boarding schools.

Members expressed specific concerns during interviews and surveys about the exclusivity of some of the social interactions at the annual conference and the need for more continuous engagement throughout the year as seen in the comments below:

It's a very kind of inbred cliquy group. And they come across that way at the conference and always have, and I think that they need to be careful about that

quite honestly. I think it's becoming a turn-off to people. And it's kind of the same people. And I also think ... it really needs to be, kind of, feel more inclusive, not so cliquy in that regard.

I'm trying to build that sense of connectivity with people that do our same work, so I think I don't know how much SBSA functions beyond the annual conference.

My question now is, and what I just had a meeting on yesterday, you know, how do we function as the Small Boarding School Association, in between conferences and in between events?

The possible unintended consequences of self-imposed parameters and limitations to attendance at the annual conference could create an inward, exclusive, and seasonal focus instead of an inclusive and ongoing external networking community. These parameters limit the potential expansion of the value proposition and the positive influence of the association on all members. To address these concerns, SBSA should:

- **Expand Communication Channels:** Utilize social media, newsletters, and the SBSA website to provide regular updates on organizational initiatives and changes. This will help bridge the gap in perceptions between leadership and the broader membership.
- **Promote Inclusivity:** Ensure that communication efforts highlight inclusivity and diverse participation. The association can foster a more welcoming environment by addressing the concerns of affiliates and educational consultants who feel less positive about SBSA's innovation and adaptability.
- **Host Branded Sessions and Events:** Engage with national-level organizations and host SBSA-branded sessions at peer events. This will increase visibility and demonstrate SBSA's commitment to innovation and leadership within the educational sector.
- **Memorialize Conference Materials:** Archive and share materials from the annual conference on the SBSA website. This will allow members who cannot attend to benefit from the content and stay informed about key discussions and developments.

By broadening communication and visibility, SBSA can counteract the inward focus created by self-imposed parameters and foster a more connected and engaged membership

throughout the year. This approach aligns with the adaptive leadership framework and supports the organization's inclusivity, visibility, and continuous improvement needs.

Combining the revised value proposition, regular meet-ups, and enhanced visibility strategies within the first three recommendations produces our final recommendation regarding member engagement.

Recommendation 4: Inspire the Membership through Involvement.

To address the perception gaps highlighted in Finding 4, as shown in Tables 10, 11, 12, 13, 14 and 18, and to foster inclusivity, the SBSA could actively engage members in its strategic planning and innovation processes. To this end, SBSA could form an internal Innovation Task Force comprising both leaders and members to explore new ideas and approaches, ensuring that the learning organization remains adaptable and forward-thinking. Clearly defining volunteer roles and providing necessary tools and support will better utilize member expertise.

Furthermore, creating leadership opportunities within the membership, such as subcommittees, can increase engagement and relieve pressure on the board. This strategy aligns with the generative capacity concept, focusing on creating new knowledge, fostering innovation, and encouraging continuous improvement through member involvement. By integrating the adaptive leadership framework, SBSA can promote environments where diverse perspectives are welcomed and actively sought. Encouraging members to step outside their usual circles and engage with different viewpoints aligns with Herminia Ibarra's (2015) recommendations for leaders to gain new insights and foster growth.

Interview and observation data revealed the additional challenges of the formation of cliques and in-group behaviors. Elitism and segregation can further marginalize those outside

these groups, stifling collaboration, adaptation, and innovation. By fostering a more inclusive environment, SBSA can build the adaptive, absorptive, and generative capacities necessary to thrive. As noted in Recommendation 3, feedback was received indicating a perception of exclusivity within the association. Henri Tajfel and John Turner's Social Identity Theory, which applies to this recommendation and Recommendation 3, illuminates how in-group dynamics can lead to a lack of diverse perspectives and create discrimination against the out-group, producing an environment that stifles collaboration, adaptation, and innovation (Tajfel & Turner, 1979). Due to the small leadership group within SBSA, this threat is significant for the association. In-group behavior works against inclusivity and creates a one-way internal perspective with false affirmation. Addressing this from another angle, Herminia Ibarra's (2015) concept of oversight emphasizes the importance of external perspectives and experiences in leadership development, advocating for getting out of one's comfort zone to foster growth and innovation. To mitigate in-group behavior and foster a more inclusive environment, SBSA should encourage a broader range of interactions and collaborations within and outside of the annual conference.

Further integrating the adaptive leadership framework into this context involves promoting environments where diverse perspectives are welcomed and actively sought. By doing so, SBSA can build the adaptive, absorptive, and generative capacities necessary to thrive in a VUCA environment and to empower the association. Encouraging members to step outside their usual circles and engage with different viewpoints aligns with Ibarra's (2015) recommendations for leaders to gain new insights and foster personal and organizational growth.

To maximize success, we encourage SBSA leadership, an all-volunteer board with full-time jobs tied to the work of boarding schools, to engage in a frank and transparent discussion about the association's capacity and desire for expansion. Considering current resources and

potential growth areas, this capacity assessment is critical to understanding whether the organization should implement new initiatives. Although this may initially feel uncomfortable (see Table 18), research by Ibarra (2015) shows that stepping outside of one's comfort zone is essential for progress. An adaptive approach to organizational growth necessitates developing oversight and leaning into "the fresh, external perspective gained from engaging in new and different activities" (Ibarra, 2015). This perspective can reenergize the association. Furthermore, the membership represents a wealth of potential for generative outcomes and is eager to provide input. We encourage the SBSA to solicit member input on how they can contribute to the organization's goals and leverage their perspectives and expertise effectively.

In conclusion, the recommendations provided above aim to address the challenges identified through data analysis and support the ongoing evolution and success of SBSA. By revisiting the value proposition, promoting community through regional meet-ups, enhancing association visibility, and inspiring membership through involvement, SBSA can build the adaptive, absorptive, and generative capacities necessary to not only thrive but enhance empowerment in a VUCA environment. These strategies will foster a more inclusive, innovative, reflective, and resilient association that aligns with the adaptive leadership framework and supports the learning organization's goals for continuous improvement and member engagement.

Limitations

This Capstone project's timing did not coincide with the team being able to attend an SBSA Board of Trustees meeting. Additionally, the timing of the May 2024 Capstone project survey abutted the SBSA's post-conference survey due to a delay on the part of the association in launching the survey. Lastly, an unforeseen challenge was the need to send multiple email

invitations to potential interview participants before receiving a reply, as well as having to reschedule interview appointments several times. During this communication process, several participants mentioned delayed responses and availability challenges due to the workload associated with the conclusion of the boarding school enrollment cycle and the academic year, both of which coincide with April and May.

Conclusion

This quality improvement project sought to assist the Small Boarding School Association (SBSA) during a moment of self-identified organizational inflection with a strategic review of the association's value proposition. The findings revealed SBSA leadership and membership valuing the association's open and informed culture and opportunities for networking and collaboration. Disparities between leadership and membership perceptions of the association's responsiveness, innovation, adaptability, and organizational promotion present opportunities for employing and enhancing elements of adaptive leadership. Therefore, drawing from the literature review and conceptual framework, the recommendations are anchored in themes of innovation, heightened promotion, and purposeful member engagement in support of enhanced association empowerment. These strategies are intended to develop adaptive, absorptive, and generative leadership within SBSA, aiding the association's 37-year journey towards long-term relevance and viability amidst the volatile, uncertain, complex, and ambiguous environment of the small independent boarding school sector. This project encourages SBSA to take **P.R.I.D.E.** in the association through **p**romotion, **r**ealizing potential, **i**nspiring membership, **d**eveloping opportunities, and **e**ngaging members in meaningful interactions to elevate the value of SBSA for all (see Figure 6).

Figure 6

SBSA Deliverable Visual



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Appendix

Appendix A

Observation Protocol for 2024 SBSA Annual Conference

Preparation and Planning:

- Attend LLO-provided sessions on observational data collection included in Capstone Seminar I (8900).
- Research background information about SBSA including the organization's mission, vision, and key initiatives and reviewing past conference schedules and design.
- Winter 2024 scoping calls and follow-up communication with SBSA leadership/contacts to discuss this protocol, placement of Vanderbilt information table, and conference etiquette.
- Review 2024 SBSA Conference Schedule and assign observations across team.

Conference Observation Protocol:

President's Announcement of Observation Team

- The organization's president will introduce the doctoral students at the beginning of the conference and share the intentions of their project, including its goals and the type of data they are seeking to gather.
- The president will explain why this work is endorsed by the organization, emphasizing its importance for quality improvement.
- The president will share that the Vanderbilt team will be available for optional engagement throughout and after the event.

Conference Sessions

- Attend keynote speeches, panel discussions, workshops, and activities.
- Take detailed notes on content, key themes, and participant engagement.

Networking and Informal Interactions

- Engage with attendees during breaks, meals, and networking events.
- Record observations about the nature of discussions, topics of interest, and dynamics.
- Introduce the project and invite participants to share their perspectives.

Engagement Norms

- The LLO team will not actively participate in breakout sessions unless asked a direct question by the facilitator or organization member.
- Be approachable and open to questions about the project.
- Distribute informational sheets about the project and LLO program.
- Collect contact information from participants interested in follow-up discussions.

Post-Session Reflections

- Convene as a team at the end of each day to debrief and consolidate notes.
- Discuss initial impressions, recurring themes, and any surprising findings.
- Identify potential follow-up questions or areas for deeper investigation.

Ethical Considerations

- Ensure confidentiality of conference participants in all notes and recordings.
- Seek explicit consent before recording any conversations.
- Be transparent about the research objectives and how the data will be used.

Appendix B

Interview Script and Questions

Introduction/Welcome:

Thank you for making time to speak with us regarding your engagement with the Small Boarding School Association (SBSA). The primary objective of this interview is to gather insights from individual members of the SBSA regarding their experiences, perceptions, and suggestions for improvement. The information collected will contribute to the organization's quality improvement efforts. Your expertise is highly valuable to our research, and we deeply respect the wisdom and experience you are willing to share with us. Because of that, we respect - and are sensitive to the fact - that *we* are guests in *your* space and that our questions during this conversation are not designed or directed to challenge your position or to question your motives, integrity, or intent. If there is an area or line of questioning that you are uncomfortable responding to, please feel free to let us know.

Finally, we respect your privacy and confidentiality through this process. All efforts, within reason, will be made to keep your personal information and your participant record confidential, but total confidentiality cannot be guaranteed. In any sort of report, we might publish, we will not include any information that will make it possible to identify a participant. Team members will remove any identifiable information and assign a numeric code to identify individuals. Only the team working on this project will have access to the coding system. Your name will not be used in either data entry or Capstone products that result from the project. Results will be published so that you are not individually identifiable. Records, including audio or video recordings, as well as written notes, will be stored on password-protected computers and

only the members of this team will have access to these records. Recordings and notes will be retained for up to six months, at which time they will be destroyed.

With your consent, we would like to record this interview session so that we may reflect on this conversation and revisit topics or themes that surface in this research. The recording and accompanying transcript will only be used for research purposes within our team and with our research supervisor. Do we have your permission to record and transcribe this interview?

(Yes/No)

Interview Questions:

1. First, we will ask a few demographic questions to frame your responses:
 - a. Role within SBSA – member, board member (i.e., leader, member school employee, educational consultant, affiliate).
 - b. Years of involvement (approximation is ok).
 - c. Experience in small boarding school sector (both professionally and personally).
2. What led you to become involved in SBSA?
3. If I said, the SBSA's programs and initiatives are meeting member needs, how would you respond? Do you agree or disagree? Why or why not?
4. In what ways has SBSA membership enhanced or failed to enhance your professional development or educational goals? If you can, please provide any anecdotes or stories that illustrate the impact of the SBSA on your professional or educational endeavors.
5. How would you describe the impact of the SBSA on your ability to collaborate with peers and share best practices specific to boarding school education?
6. From your perspective, what contributions or resources, if any, does the SBSA bring to the field of boarding school education that you may not find elsewhere?
7. What suggestions or improvements would you propose to enhance the value and relevance of the SBSA to its members?
8. How do you envision the future growth and evolution of the SBSA in supporting educational professionals like yourself?

9. What hot topics are on your mind in the field of boarding schools that you think SBSA should address?
10. Now that you've had a chance to reflect over the course of the interview, in your own words, what is the SBSA's value?
11. Is there anything else our Capstone team should know about SBSA or look into further?

Closing/Follow-Up:

Thank you very much for sharing your time and expertise with us today. Your insights are valuable to our research, and we want to make sure that we are preserving, with highest fidelity, your candid feedback. To that end, we would like to follow-up today's interview by providing you with a copy of the interview transcript - for your review - and with the possibility of hosting a second interview if you are willing and available. Do we have your permission to follow-up in a few weeks to provide a copy of the transcript and to – potentially – schedule a follow-up interview? (Yes/No).

Post-Interview Follow-up:

1. Thank you email: *Thank you, once again, for your participation in today's interview. If have any questions, further insights, or would like to receive a copy of the transcript, please do not hesitate to be in contact with me or a member of our team. [add email addresses].*
2. Transcript: Process interview transcript and place in "Interview Transcript" File. Replace interviewee name with a number.
3. Upload Transcript to Taguette (<https://www.taguette.org/>) for Coding.

Appendix C

March 2024 Conference Surveys

Survey Distribution Plan:

- A unique QR code will be generated using Microsoft Forms for each day, 1, 2, and 3.
- The survey link will be posted around the conference site including the Relaxation Station, Vanderbilt capstone team table, dining hall, lecture hall, near bathrooms. Signage will indicate it is an optional survey.
- The approximate window for each day's survey collecting data is 10:00 AM-4:00 PM.

Day One Conference Survey Questions:

1. What motivated you to attend the conference? (free response)
2. How often do you engage with SBSA?
 - a. This is my first time.
 - b. Just for the conference (annually).
 - c. Quarterly
 - d. Monthly
3. Enter your email address if you are interested in being interviewed about your engagement with SBSA. (Interviews will be scheduled for April and May, are approximately 20-30 minutes in length, conducted over Zoom, and will be confidential.)
4. What is your SBSA membership category? (free response)

Day Two Conference Survey Questions:

1. Finish this sentence, "The purpose of SBSA is...." (free response)
2. How does SBSA support innovation for small boarding schools? (free response)
3. If you haven't already, enter your email address if you are interested in being interviewed about your engagement with SBSA. (free response)
4. What is your SBSA membership category? (free response)

Day Three Conference Survey Questions:

1. Rate your overall conference experience. (1-5 stars)
2. Did you learn something at the conference that you will bring back to your organization?
 - a. Absolutely yes
 - b. Maybe
 - c. Definitely Not
3. How likely are you to recommend the SBSA conference to a colleague? (scale of 0-10, “not at all likely” to “extremely likely”)
4. If you haven't already, enter your email address if you are interested in being interviewed about your engagement with SBSA. (free response)
5. What is your SBSA membership category? (free response)

Appendix D

May 2024 Survey

Survey Distribution Plan:

- A unique survey link will be generated using Microsoft Forms.
- The survey link will be disseminated by the SBSA's president via email with a reminder email sent by the SBSA president at intervals to encourage participation.
- The capstone team will provide the email script to SBSA.
- The approximate window for survey deployment at collection is May 1-May 20, 2024. The deployment was postponed to May 15, 2024, per SBSA's request.

Survey Preamble and Questions:

SBSA Member Survey May 2024

Conducted by Vanderbilt University Doctoral Students

Thank you for taking the time to complete this brief survey regarding your engagement with the Small Boarding School Association (SBSA).

The primary objective of this survey is to gather insights from individual members and affiliates of SBSA regarding their experiences, perceptions, and suggestions for improvement. The information collected will contribute to the organization's quality improvement efforts.

Your expertise is valuable to our data collection, and we deeply respect the wisdom and experience you are willing to share with our team. If there is an area or line of questioning that you are uncomfortable responding to, please feel free to skip the prompt and move to the next question.

Finally, we respect your privacy and confidentiality through this process. In any sort of report we might publish, we will not include any information that will make it possible to identify a participant. Team members will remove any identifiable information and assign a numeric code to identify individuals. Only the team working on this project will have access to the coding system. Your name will not be used in either data entry or report products that result from the project. Results will be published so that you are not individually identifiable.

1. How often do you engage with SBSA?
 - a. Weekly
 - b. Monthly
 - c. Quarterly
 - d. Annually
 - e. Rarely

2. Please indicate how many times you attended the SBSA conference in the past 10 years:
 - a. 0
 - b. 1-2
 - c. 3-4
 - d. 5-6
 - e. 7-8
 - f. 9-10

3. What is your involvement with SBSA?
 - a. Board Member, past or present
 - b. Member School Employee
 - c. Educational Consultant
 - d. Affiliate
 - e. Other

4. How many years have you been professionally engaged in the small boarding school sector?
 - a. 0-5 years
 - b. 6-10 years
 - c. 11-20 years
 - d. 21+ years

5. Using the scale of “Strongly Disagree” to “Strongly Agree,” please rate your level of agreement with the statements:
 - SBSA promotes a culture of innovation to its members.
 - SBSA understands the landscape and realities facing its members.
 - SBSA effectively adapts its strategies to meet the diverse needs of its members.
 - SBSA fosters a culture of learning and knowledge-sharing among its members.
 - SBSA is a forward-thinking organization.
 - SBSA is well-versed in the latest knowledge related to independent school education.
 - SBSA is receptive to member input/feedback.
 - SBSA effectively addresses the unique challenges and needs of its members.
 - I would participate in SBSA-sponsored professional development programming outside of the annual conference.
 - I would be willing to facilitate SBSA-sponsored professional development programming outside of the annual conference.

- I would recommend involvement with SBSA to a colleague in the small boarding school sector.
 - I value my involvement with SBSA.
6. Please use the space below to share any additional thoughts on the value, services, mission, purpose, or impact of SBSA

Appendix E

Coding Procedures

Conference survey questions and impromptu interview data was initially inductively reviewed by research team members, after which the group met to refine the codebook in preparation for a deductive approach for a second round of coding of the conference surveys, impromptu interviews, long-format survey, formal survey data and the existing documents (Ravitch & Carl, 2021, p. 177). To support validity, the members of the research team independently coded the conference surveys and impromptu interview data as informed by the conceptual framework of the ontology of adaptive leadership using inductive, thematic coding (Heifetz, Linsky & Grashow, 2009; Ravitch & Carl, 2021).

Taguette, a research coding platform, was used for this process because it allows shared access to survey data, transcripts, existing documents, and coding results across the group in real time. Sixteen (16) coding categories emerged following the group meeting on April 3, 2024. Following the discussion about the inductive process, the following codes were retained for the further analysis of the conference survey, impromptu interviews, and the coding of the existing documents, long-format survey, formal interviews, and follow-up interviews due to their apparent relevance to the main and sub-research questions, as well as the indicators of adaptive leadership as informed by the extant literature and conceptual framework.

The abridgement of the original list of sixteen (16) potential to a selection of eight (8) codes was finalized by the team during the week of May 27, 2024, and include:

Table E1

Tagging Descriptions for Data

Tag	Description
Collegiality	Activities, practices, or interventions promoting a sense of community, mutual respect, and collaboration among stakeholders within small boarding schools. Terms such as teamwork, connection, relationships, network, camaraderie, collaboration, and cooperation can be related to collegiality.
Networking	Interactions, initiatives, or programs aimed at developing connections and relationships among members of the Small Boarding School Association.
Adaptive Leadership	Instances of leadership characterized by the ability to adapt to changing circumstances, embrace uncertainty, and mobilize stakeholders to address complex challenges within small boarding schools.
Generative Leadership	Leadership approaches that encourage innovation, creativity, and forward-thinking solutions to enhance the effectiveness and relevance of small boarding schools.
Stakeholder Engagement	Strategies and activities to involve and communicate with various stakeholders, including students, parents, staff, alumni, and community members, in decision-making processes within small boarding schools.
VUCA	Volatile, Uncertain, Complex, Ambiguous; A concept describing the dynamic and challenging nature of modern environments characterized by rapid change, unpredictability, interconnectedness, and ambiguity.
Sensemaking	The process of creating meaning and understanding from complex or fragmented information to navigate uncertain situations and make informed decisions.
Relational Leadership	Leadership approach emphasizing the importance of building and nurturing positive relationships, trust, and collaboration among constituents to achieve common goals and develop organizational effectiveness and resilience.

The group convened to on May 26 & 29, 2024 to cross-read any specific pieces of data that presented complication or uncertainty during the coding process using the techniques of structured reflexivity and disconfirming evidence before drafting the preliminary findings section (Ravitch & Carl, 2021, pp. 287-288).

Appendix F

SBSA Bylaws

BYLAWS OF THE SMALL BOARDING SCHOOL ASSOCIATION

A Virginia Nonstock Corporation

ARTICLE I - DIRECTORS

General Powers. The business and affairs of the Corporation shall be managed by the Board of Directors, which shall have all voting power to vote on electing, appointing or removing directors.

Number of Directors. The initial Board of Directors shall consist of six individuals. The number of Directors thereafter shall be determined by resolution of the Board of Directors, provided that the Board of Directors shall in no event be greater than fifteen, and no fewer than six in number.

Election of Directors. Directors shall be elected or appointed by the incumbent Directors of the Corporation in the manner prescribed below:

Elected Directors shall be divided into three classes as nearly equal in number as possible. The initial term of the Directors constituting the first class shall be one year, ending at the annual meeting of the Board in 2005; the initial term of the Directors constituting the second class shall be two years, ending at the annual meeting of the Board in 2006; and the initial term of Directors constituting the third class, as well as the subsequent terms of Directors in all classes, shall be two years, with the exception of the President, whose term shall be three years.

Individuals may serve more than two consecutive two-year terms as a Director if agreed upon by unanimous vote of the Board of Directors. Nominees for Board positions must be SBSA members in good standing with SBSA. **[Amended June 5, 2019 by unanimous vote]** to read: Directors are elected to serve a 2-year term and may be re-elected for two more consecutive terms, not to exceed three terms totaling 6 years. If a Director is elected to an Officer role, they can serve two subsequent terms in any of the three officer positions, excluding the President role. Nominees for Board positions must be SBSA members in good standing, and may also be extended to Industry Affiliates who demonstrate support of the mission Small Boarding School Association. in good standing with SBSA.

Place and Notice of Directors' Meeting. The annual organizational meeting of the Board shall be held during the SBSA annual conference for the purpose of electing officers and transacting such other business as may come before the meeting.

Regular meetings of the Board may be held at such a time and place as the Board may determine by resolution.

Notice of Meetings. No notice of the annual meeting or any other regular meeting of the Board shall be required. Notice of each special meeting shall be emailed to each Director at least fourteen days before the date of the meeting. Neither the business to be transacted at, nor the purpose of, any meeting of the Board need be specified in the notice or waiver of notice of the meeting.

Quorum. A majority of the Directors shall be necessary to constitute a quorum for the transaction of business, and the act of a majority of the Directors present at any meeting at which there is a quorum shall be the act of the Board of Directors. If a quorum shall not be present at any meeting of the board, the Directors present may adjourn the meeting from time to time without notice until a quorum shall be present.

Actions Without Meeting. Any action that may be taken at a meeting of the Board of Directors may be taken without a meeting if a consent in writing, setting forth the actions to be taken, shall be signed by all the Directors before the action is to become effective. The Directors' consent shall have the same force and effect as a unanimous vote.

ARTICLE II - OFFICERS AND AGENTS

General. The officers of the Corporation shall consist of a President, a Secretary, and a Treasurer. The Treasurer and Secretary shall serve a two-year term until the annual meeting of Directors two years after their election and until their successors are elected. The President shall serve a three-year term after their election and until their successors are elected. At each annual meeting of Directors, the Directors shall elect officers to fill vacancies occurring at the meeting. Any person may hold any two or more offices simultaneously. **[Amended June 5, 2019 by unanimous vote]** to read: Officers are elected to a two-year term. They are eligible to serve, but not exceed, two consecutive terms, totaling four years. At the conclusion of elected terms, an Officer may be elected to the Board as a Director. The President is elected to a three-year term, and may be re-elected for a second term, not to exceed two consecutive terms totaling six years. In addition, two Board roles have been established:

- a. **Ex-Officio:** This position is offered to the immediate past president, to serve in a no-voting capacity as advisor to the sitting President and Board and may attend all meetings and events. The Ex-Officio may remain in the position for the first term of the newly elected sitting President and as such at the end of the first three-year term will discontinue.
- b. **Board Emeritus:** Emeritus positions acknowledge long-time commitment and support of SBSA, and are nominated and voted on by the Board of Directors to serve in perpetuity (or until the individual resigns the role). They will hold a non-voting seat at the Directors table and may attend all meetings and events.

President. The President shall be the chief executive officer of the corporation and shall be primarily responsible for implementing the policies and procedures established by the Board of Directors. The President shall preside at meetings of the Board of Directors, supervise the other officers, agents and employees of the Corporation, perform such other duties as may be prescribed from time to time by the Board of Directors, and have all other powers and duties that pertain to the position of chief executive officer.

Secretary. The Secretary shall certify the actions of the Board of Directors when necessary, keep the minutes of the Board of Directors, maintain the records of the Corporation, give notice of any meetings of the board of Directors, and have such other powers and duties as may be prescribed by the Board of Directors from time to time.

Treasurer. The Treasurer shall have custody of all operating funds of the Corporation and shall see that a true and accurate accounting of the financial transactions of the Corporation is made and that the reports of those transactions are presented promptly to the Executive Committee and the Board of Directors.

Vice Presidents and Other Assistant Officers. Vice presidents and other assistant officers shall have power and duties as the Board of Directors may prescribe from time to time. Assistant officers may, in the absence of the officers they assist, exercise the authority of

those officers. In the event of a vacancy in any assisted office, the assistant officer having the greatest period of service in office shall assume the powers and duties of the vacant office.

Agents. Such agents as the Board of Directors may deem necessary may be elected, appointed, or chosen in the manner prescribed by the Board. The authority and duties of each agent shall be those prescribed in the resolution adopted by the Board of Directors establishing the need for the agent.

Removal of Officers and Agents. Any officer or agent may be removed with or without cause whenever the Board of Directors in its absolute discretion shall consider that the agent's removal will serve the best interest of the Corporation. Any agent appointed otherwise than by the Board of Directors may be removed with or without cause at any time by any officer having authority to appoint the agent whenever that officer in the exercise of absolute discretion shall consider that the agent's removal will serve the best interests of the Corporation. Election or appointment of an officer or agent shall not itself create contract rights.

ARTICLE II - OFFICERS AND AGENTS

Executive Committee. The Board of Directors may appoint an Executive Committee, consisting of the President and two or more members of the Board, which may, to the extent consistent with law, exercise the authority of the Board between meetings of the Board. The Executive Committee may establish its own rules for holding and conducting meetings not inconsistent with law, the Articles of incorporation or these bylaws.

Finance Committee. The Board of Directors may appoint a Finance Committee which shall consist of the Treasurer and as many as three additional Directors. The Finance Committee shall be responsible for developing and reviewing fiscal procedures and policies, and shall participate in the development of an annual budget for the Corporation.

Other Committees. The Board of Directors may create such other committees as it may deem appropriate and appoint membership any persons, whether they be members of the Board of Directors or not, and may fix and prescribe their rights, duties, power, authority, and terms of the office.

Actions Without Meeting. Any action that may be taken at a meeting of a committee may be taken without a meeting if consent in writing, setting forth the action so to be taken, shall be signed by all members of the committee before the actions is to become effective. The members' consent shall have the same force and effect as a unanimous vote.

MEMBERSHIP

Eligible schools, whether totally boarding or day/boarding, must be designed for student to complete a full academic year at the school and have a boarding program enrollment limited to near or below 200 students. Schools with program where enrollment is designed for partial, transactional, or temporary instruction are ineligible. The school must hold not-for-profit status and be accredited or in the process of formal accreditation by a state, regional, or national accrediting agency. Educational Consultants and Agents are also eligible for membership.

ASSOCIATION MEETINGS

SBSA will hold an annual spring conference, the site and time of which will be determined by the Board. The purpose of the spring conference will be to provide professional development and peer interaction for members and to conduct an annual business meeting for the Association. The Board shall meet at least twice a year; the site and location to be determined by the Board. Should Board meetings be held at the same time as the annual spring conference or at the SSATB conference, transportation expenses will not be covered by SBSA. If more meetings of the Board are necessary, the President will determine the most economical times and locations, and the Association will assume transportation expenses. The Association will reimburse expenses specifically related to attendance at the annual Summer Board Meeting.

FISCAL POLICY

The SBSA fiscal year begins July 1 and ends June 30 each year. All fiscal commitments into which the Board enters shall be contractually structured so that each successive Board shall be able to evaluate and direct the use of all dues collected for their respective fiscal year. At least one Board member, besides the Treasurer, shall verify the accuracy of the accounting of the funds. A line-item Treasurer's Report, being of consistent format, will be presented at the business meeting at the annual spring conference. All expenses of SBSA must be authorized in advance by the Board member responsible for the project for which the expense is to be incurred and by the Treasurer. The financial ramifications of the activities being proposed for the upcoming year shall be presented at the business meeting for group consensus.

ARTICLE IV - MISCELLANEOUS PROVISIONS

- I. **Fiscal Year.** The fiscal year of the Corporation shall begin on July 1st each year.
2. **Amendment of Bylaws.** The power to alter, amend or repeal the bylaws of the Corporation or to adopt new bylaws shall be vested exclusively in the Board of Directors.

Adopted at the organizational Board of Directors of the Corporation on the 18th day of June 2014, by a unanimous vote of the Board of Directors.

Appendix G

2024 Conference Schedule

MONDAY, MARCH 25, 2024

1:00 to 1:45 p.m.

First-Time Attendee Session

2:00 to 2:30 p.m.

Welcome: Lisa Pelrine, SBSA Board President
Taylor Docking, Director of Enrollment Management, Indian Springs School
Scott Schamberger, Head of School, Indian Springs School
Concert Hall

2:45 to 3:30 p.m.

Affinity Groups
Classroom TH14 (Blue Lounge): Heads of School
Classroom A1: Marketing/Communications
Swan Studio: Directors of Enrollment/Admissions
Private Dining Room (KSCC): Assistant/Associate Directors of Enrollment/Admissions
Classroom C11: Potpourri (for those who don't identify as any of these groups)
John Badham Theater: Educational Consultants

3:45 to 4:45 p.m.

[Breakout Session I](#)

Various Locations

5:00 p.m.

First Networking Event
Community Commons

TUESDAY, MARCH 26, 2024

8:00 to 9:00 a.m.

Southern Breakfast
Community Commons

9:00 a.m. to 5:00 p.m.

Relaxation Station
Engel Terrace/Library

9:00 to 9:30 a.m.

Welcome & Today's Program Overview
Presentation of the Gorman Award
Announcement of the 2025 Conference Host
Concert Hall

9:30 to 10:30 a.m.

Have You Ever? An all-conference event where small groups problem-solve challenging scenarios.

Engel Terrace
(Navigate to the number assigned on your nametag)

10:30 to 11:00 a.m.

Networking Opportunities
Engel Terrace/Library

11:00 a.m. to 12:00 p.m.

[Breakout Session II](#)
Various Locations

12:15 to 1:15 p.m.

Lunch
Community Commons

TUESDAY, MARCH 26, 2024, con't

1:30 to 2:30 p.m.

[Breakout Session III](#) (for Schools and Affiliates)

Various Locations

All Educational Consultants to Attend an Indian Springs School Special Presentation

John Badham Theater

2:30 to 3:00 p.m.

Break / Networking

Outdoor locations around campus

3:00 to 4:00 p.m.

[Breakout Session IV](#)

Various Locations

4:15 p.m.

Evening Reception

Community Commons/outdoor space

WEDNESDAY, MARCH 27, 2024

8:00 to 9:00 a.m.

Southern Breakfast

Community Commons

9:00 a.m. to 12:00 p.m.

Relaxation Station

Library

9:00 to 10:00 a.m.

[Breakout Session V](#)

Various Locations

10:15 to 11:00 a.m.

Consultant Panel

Concert Hall

11:00 to 11:15 a.m.

Last Call Voting

Concert Hall

11:15 to 12:15 p.m.

Last Call Breakouts

Various Locations

Appendix H

Additional Quantitative Data

Table H1

Total participant count in membership categories for daily conference surveys.

Conference Day	Leaders	Members	Total Participants
Day 1 (3/25/24)	2	40	42
Day 2 (3/26/24)	4	40	44
Day 3 (3/27/24)	1	32	33

Table H2

Results from Day One Conference Survey question, “How often do you engage with SBSA?”

Response Options	Total Participants (n=42)
Just for the conference (annually)	23
Monthly	3
Quarterly	4
This is my first time	12

Table H3

Results from Day Three Conference Survey question, “Rate your overall conference experience.”

Response Options	Total Participants (n=33)
1 star	0
2 stars	0
3 stars	1
4 stars	8
5 stars	24

Table H4

Results from Day Three Conference Survey question, “Did you learn something at the conference that you will bring back to your organization?”

Response Options	Total Participants (n=33)
Absolutely Yes	32
Maybe	1
Definitely No	0

Table H5

Results from Day Three Conference Survey question, *“How likely are you to recommend the SBSA conference to a colleague?”*

Response Options	Total Participants (n=33)
10	22
9	6
8	2
7	0
6	1
5	1
4	0
3	0
2	0
1	0
0	0