



Who Should Read

Incoming Heads
of School

Outgoing Heads
of School

Board Chairs

The Head's Transition Playbook

How to Navigate a Head of School Transition

Three Ways to Use this Playbook

- Develop a comprehensive process to introduce an incoming head of school
- Delineate the roles of the incoming head of school, outgoing head of school, and the board chair
- Engage community members and stakeholders in the transition process

Independent School Executive Forum

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The Independent School Executive Forum is EAB's first research program for Pre-K to 12 schools, focusing on the best strategies and practices to address the most critical challenges facing heads of school, including: ensuring financial sustainability, enhancing fundraising and alumni engagement, balancing academic rigor with attention to student wellness, and optimizing faculty recruitment and professional development.

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Executive Summary

Most heads of school and their schools have not had the opportunity to perfect the transition process. As one head of school pointed out, “unfortunately, we don’t have a chance to get better at the transition itself.” With that in mind, we have gathered the advice and experience of 25 independent school leaders to help guide you through this challenging process.

Incoming heads of school, their outgoing counterparts, and board chairs must all work together to ensure a smooth transition. To best prepare for a transition, set clear expectations for each stakeholder throughout the process.

A clear chain of command is critical for a successful transition. Schools must ensure that the community sees continuity in leadership. In most cases, the incoming head of school will still have responsibilities in their current role and cannot be expected to have the requisite understanding of the school to lead effectively before they officially assume their new role. Barring extenuating circumstances, the outgoing head of school is responsible for the day-to-day operations of the school until the new head’s official start date.

The board chair and outgoing head of school must ensure that critical relationships are not lost or damaged during the transition. They should work toward a complete transfer of information with the incoming head of school. Outgoing heads of school are often a wealth of institutional knowledge and the focal point of significant relationships with key stakeholders.

The outgoing head of school and board chair must support the incoming head of school in their quest to get to know the role and the school. As one head of school said, “There’s truly only one person who knows the head’s job, and that’s the head of school.” The board chair and outgoing head of school should give the incoming head time, space, and grace to make decisions on their own, while demonstrating support for the new leadership.

Failure to establish a strong board chair-incoming head of school relationship can put the transition and head’s tenure at risk. Each party should work to ensure that they have a clear understanding of expectations for communication and solid foundation for working together.

In creating this playbook, we spoke with outgoing heads of school, new heads of school, as well as their board chairs, administrators, and executive search consultants. Based on those conversations and our research, we created tools and resources to help schools ensure a smooth transition from one head of school to the next. Because every transition is unique, and each school is operating on a timeline specific to their situation, each tool might not be applicable in every situation. The resources in this playbook can be adapted and customized to suit your school’s specific context.

The playbook is divided into three parts, one for each stakeholder: incoming head of school, board chair, and outgoing head of school.



1 | Resources for Incoming Heads of School

2 | Resources for Board Chairs

3 | Resources for Outgoing Heads of School

4 | Advice from Those With Experience



Resources for Incoming Heads of School

Overview

As incoming head of school, you have one of the most challenging roles – you will need to learn the political climate and culture of the school while leading it. You are tasked with doing two jobs at once: the obligations and responsibilities of your current role and the obligations and responsibilities of your new position.

Below are three lessons, with associated guidance and tools included in this section, to help you navigate the transition period.

- 1. Prioritize the relationship with your board chair.** Failure to establish a strong board chair-incoming head of school relationship can put the transition, and your tenure, at risk. A strong relationship can help avoid some of the most common causes of a short tenure: disagreement on the pace of change, expectations for progress, and/or school needs. Use the transition period to align on these issues and begin your tenure from a place of shared expectations.

Guidance and Resources:

- Build Strong Head of School – Board Chair Relationship (p. 7)
- Set, Agree on First-Year Charge (p. 8)

- 2. Do not rely on a single source to provide complete information on any function of the school.**

Use meetings as both networking and fact-finding opportunities. Ask a variety of constituent groups and stakeholders direct questions about the school to inform your own independent analysis of the institution's health.

Guidance and Resources:

- Use Multiple Sources to Understand School Landscape (p. 9)
- *Tool:* Opening Administrative Retreat Planning Guide (p. 11)
- *Tool:* Departmental Briefings (p. 15)
- Conduct a School-Wide Listening Tour (p. 19)
- Use Targeted Questions to Jumpstart Conversations (p. 20)
- *Tool:* Community Players "Dance Card" (p. 21)
- *Tool:* Conversation Cards (p. 24)

- 3. Judiciously manage your calendar to ensure every meeting has a clearly defined purpose.**

There will be many people who want the chance to meet with you, so you will have to critically assess the importance of each potential meeting. Ask the outgoing head of school and director of advancement for guidance on who to meet with immediately, who to meet in your first 1-3 months, and who to meet with later in your tenure. These two can share insight on external meetings to prioritize and ensure that key relationships with donors and other stakeholders are not lost during the transition.

Guidance and Resources:

- Audit Calendar to Ensure First 90 Days Well Spent (p. 27)

Build Strong Head of School–Board Chair Relationship

Establish Norms and Expectations to Ensure Open, Effective Communication

The relationship between you and your board chair is one of the most important that you will have, so it is imperative that you align expectations and establish communication protocols early on.

Use the questions below to ensure that you and your board chair have established clear expectations in priority topic areas.

Priority Topic Areas to Discuss, Questions to Set Expectations With Board Chair



Communication Schedule

Establish expectations for timing, frequency to ensure consistent but manageable communication

- Have you set a schedule to meet at least once a month during the transition period?
- Who will set the agenda for meetings?
- Have you determined how you will communicate between these meetings?
- How does the board chair prefer to communicate?
- How do you prefer to receive information?



Introduction Plan

Determine how you will be introduced to the community and key stakeholders

- Did you create a list of people to meet during the transition?
- Have you established expectations for how many visits to campus and meetings you will have between your announcement and official start date?
- Do you have an agreed-upon schedule for meeting key stakeholders?
- Have you established a communication plan that includes messaging to the community?



First-Year Charge

Agree on goals, methods of evaluation for first year

- Have you agreed on a final set of goals for your first year? (*see p. 8*)
- Has the full board been informed of these goals?
- Have you discussed how these goals will be shared with the school community?



Long-Term Vision

Discuss long-term goals and expectations for yourself and the school

- Do you have an outline of what you would like to accomplish in the next two to three years?
- Are you up-to-date on the status of on-going, long-term projects at the school? If not, what is the plan to get caught up?
- Have you determined how often you will report progress to the board?

Set, Agree on First-Year Charge

Align Board and Head Expectations While Sending Clear Message to Community

While you may have had many conversations with the board about their vision and goals for the school during the interview process, it is important to take time to discuss their goals for you and a potential timeline to accomplish those goals. It is particularly important in your first year to make sure you and the board have a clear, shared understanding for your initial progress and priorities. Use the tips below to guide your conversations on setting a first-year charge.

Tips for Setting A First-Year Charge



Limit the Number of Goals

Keep the number of goals manageable. More than 3-4 goals will be hard to accomplish in one year and potentially leave the impression of trying to change too much too quickly.



Manage the Scope of Goals

Set two types of goals: goals focused on learning the school and its community and goals focused on supporting the school's growth and implementing changes.



Define the Duration of Goals

Ensure that some goals can be accomplished in the first year and delineate which ones will take more time to complete, despite initial progress.



Monitor the Progress of Goals

Update the board on your progress toward each goal at board meetings so they receive regular communication and can help troubleshoot or modify goals on an ongoing basis, rather than at year's end.



Discuss the Transparency of Goals

Determine which goals are sensitive and should be confidential to avoid causing anxiety in the school community versus those which should be shared broadly to communicate the vision and expectation for the new head. Goals related to restructurings, changing traditions, or other practices are often best kept private while goals around community building and capital campaigns, among others, should be shared.



Share Appropriate Goals with the Community

Share the first-year goals that are appropriate and relevant with the community. This transparency will help level set expectations for you in your first year, signal unity of vision with that of the board, and help keep the community from pushing for other priorities to be addressed in your first year.

Use Multiple Sources to Understand School Landscape

Accurate Assessment of School Health Requires Thorough Investigation

You will learn key details about the school during the search and interview process, but the most favorable picture is often painted. Once you accept the position, you should embark upon a fact-finding mission to truly understand the school's overall health and form your own perspective. In addition to asking key questions of each department leader, it is also imperative to get the input of others who can help round out your understanding.

You should take a triangulation approach to this mission; seek out as many sources as possible who can provide you with a variety of viewpoints, experiences, and history with the school. Use the information you gather to form your own perspective and map of the school's challenges and opportunities. Below we have outlined guidance for how to approach the process.

On the next page you will find suggested questions to help you learn about each function of the school, along with additional resources you might look to for a more complete picture of that functional area. These questions are intended to guide your conversations and are sorted by key roles within the school.

Create Your Own Assessment of the School



Gather Information From A Wide Variety of Community Members

We teach students to use multiple sources to build a strong essay; use this same guidance as you learn the landscape as head of school.

Consider the following questions as you speak with your sources:

- Who else is involved in this areas of the school? Who has a stake in its success?
- Who do you rely on for additional context or color? Who is in the know?
- Who would disagree with you? Why?
- Who are the behind-the-scenes players that always get things done?



Establish a Thesis, Findings Based in Research

Like any good research paper, you will use what you have learned to form a thesis and reach your own conclusions.

Think about the following as you reflect on your conversations:

- Were there any significant differences in perspective among those you spoke with?
- Did you see any concerning trends?
- Are there any issues that should be addressed immediately?
- Who emerged as a reliable source or thought partner?




"In many ways you're like a detective when getting to know the school. You're talking to people and trying to piece together the full story. **You're doing detective work.**"

Head of School



Use Multiple Sources to Understand School Landscape

Questions, Suggested Advisors to Consult to Learn About the School

Role	Key Questions 	Other Advisors 
Chief Financial Officer	<ul style="list-style-type: none"> • What is our financial health? • Are there potential liabilities or risks I should know about? • What are our operating expenses? • Where are there opportunities for us to save? • What are we waiting to do? What investments or improvements have we put off? 	<ul style="list-style-type: none"> • Current and former board chairs • Outgoing head of school (if possible) • Chair of the finance committee
Director of Advancement	<ul style="list-style-type: none"> • What is our donor health? • Who are the key donors I need to know? • What has the strategy been and what are the opportunities for growth or change? • What percentage of our major donors are alumni and which percentage are friends of the school? 	<ul style="list-style-type: none"> • Current and former board chairs • Chair of previous or current capital campaigns • Director of communications
Director of Admissions/ Enrollment Management	<ul style="list-style-type: none"> • What was our enrollment yield last year? What is our yield by division? • Are any divisions below or above yield targets? • Has our overall acceptance rate changed over the past 3 years? Have division rates changed? • What does the current market look like? Are there new competitors coming into the market? 	<ul style="list-style-type: none"> • Assistant director of admissions/ enrollment management • Board chair • Director of financial aid • Director of communications
Diversity, Equity, and Inclusion Director	<ul style="list-style-type: none"> • What current efforts are underway? How successful have they been? • Where is our greatest opportunity for growth or improvement? • What can I do to support you? 	<ul style="list-style-type: none"> • School-based affinity groups or their alumni/alumnae counterparts • Director of communications • Board chair or committee chair
Director of Alumni Engagement	<ul style="list-style-type: none"> • What is the overall engagement of our alumni? • Are there generational engagement trends? • What have we done to try to engage disengaged alums? 	<ul style="list-style-type: none"> • Young alumni/alumnae • Alumni/alumnae with a long history of giving • Director of communications

Source: EAB interviews and analysis.



Opening Administrative Retreat Planning Guide

Tool Description

During a period of transition it is important that the school's administrative team is supported and sees a continuation of leadership. There should be no power vacuum, perceived or otherwise. To demonstrate continuity, the school should host two administrative retreats: a closing retreat with the outgoing head, an opening retreat with the incoming head. This tool will guide the planning process for these administrative retreats and complements the guidance given to outgoing heads of school on hosting their final retreat at the school.

Recommended Owner: Incoming Head of School

Supporters: Outgoing Head of School

Instructions

Use this tool to guide your planning of the opening administrative retreat. It should take place during your first month in seat and mirror the closing administrative retreat hosted by the outgoing head of school (p. 52) during their final month in seat.

- 1** Plan an opening administrative retreat to occur in your first month on the job. Set goals for your retreat and use the guidance on the next page (p. 12) to ensure a successful meeting. Determine how you will incorporate departmental briefings (p. 15) into the retreat.
- 2** Develop an agenda for your administrative retreat. Use the sample agenda (p. 13) to build out the schedule for the day.
- 3** Use the retreat checklist (p. 14) to ensure all logistics are set.

Use Retreat to Build Foundation for the Year

Guide to Leading A Successful Opening Administrative Retreat

1 Prepare for the Retreat



Plan Logistics; Gather Information, Context About Retreat Attendees

Questions to Consider about Attendees

- How well does the administrative team already know each other?
- Are there group dynamics to watch out for?
- Who among the administrative team leads the group?
- What team building activities can you lead?
- Will you bring in an outside facilitator for any activities?

Related Tools and Activities



Departmental Briefings (p. 15)

Solicit completed departmental briefings to gain insight, useful background information



Retreat Agenda & Checklist (p. 13-14)

Review checklist to ensure all logistical details are set for the retreat, create retreat agenda

2 Use Retreat To Deepen Relationship with Your Team



Focus on Forward-Looking Conversations, Activities

Questions to Ask During the Retreat

- Are there issues or topics that came up in the closing retreat that we need to cover?
- What is each department's goal for the year? What are shared goals across departments?
- Are there opportunities for clarity in any current processes or functions?

Framing areas of concern in the school's systems, functioning, and processes as "ambiguities" allows the team to **address concerns** and clear up confusion **without assigning blame**

3 Build on the Momentum of the Retreat



Develop Action Items, Next Steps

Potential Next Steps Following Retreat

- Share a document with the team outlining how you will use the results of the retreat
- Schedule meetings with additional stakeholders identified at retreat
- Use listening tour to learn more about topics highlighted in the retreat

Related Tools and Activities



Conduct a School-Wide Listening Tour (p. 19)

Conduct individual, group meetings to learn more about the school

Opening Administrative Retreat Sample Agenda

Administrative
Retreat [YEAR]

Attendees:

- 7:30 am **Arrival**
Light Breakfast
- 8:00 am **Team Building Activities**
- Introductions
 - Ice breaker and team building activities
- Break*
- 9:30 am **Discuss Departmental Briefings**
- Discuss, reflect on each department's briefing document (template attached)
- 10:30 am **Review Case Studies and Address Institutional Ambiguities**
- Complete case study exercise as a group
 - Identify ambiguities for our school's systems, processes, and functions
- 12:00 pm **Lunch**
- 1:00 pm **Looking Forward to the Next Year**
- Provide feedback on the head of school's 90-day plan
 - Share forward-thinking portions of each department's briefing to determine how we can support goals across the school
- Break*
- 3:30 pm **Team Building and Reflection**
- Additional team building activities
 - Reflection on the day's activities
- 5:00 pm **Conclusions and Next Steps**
- Discuss next steps and immediate action items

Opening Administrative Retreat Checklist



Meals, Location

Meals have been accounted for, as applicable

Space is reserved

Space is set up for the retreat



Materials

Participants have been asked to complete the briefing, if applicable

Briefings have been collected, if applicable

Materials needed for team building activities ready, if applicable



Agenda

Agenda has been set (see sample provided for guidance)

Agenda shared with attendees



Miscellaneous



Departmental Briefings

Tool Description

Getting to know a new school takes time. Collecting briefing documents from each department allows you to quickly gather a large volume of information. Departmental briefings are 2-page documents written by your administrative team for you. The information and intel they provide should compliment what you are gathering in your conversations and will further help you map the school landscape and deepen your understanding of the community.

Depending on the context of your transition, it may or may not be appropriate to work with the outgoing head of school to collect departmental briefings. Use your judgment in determining whether to collect briefings in advance of your official start as head of school. This tool includes suggestions for alternative processes as well.

Recommended Owner: Incoming Head of School

Supporters: Outgoing Head of School; Administrative Team

Instructions

Briefing documents are short summaries of key points for each department at that school. You should collect one from all departments and functions at the school.

Use this tool to guide departmental briefings. The first page includes details and questions to consider throughout the briefing process; a briefing template follows. Consider the following options for collecting departmental briefings and determine which approach is best at your school.

- 1** Prior to their departure, have the outgoing head of school **request that each department complete a briefing**. This includes admissions, advancement, enrollment, athletics, operations, facilities, business, student support services, etc.
- 2** Request each team leader **submit their briefing in advance of your opening administrative retreat**.

Use Departmental Briefings to Gather More Information

Briefings Cover Strengths and Areas of Opportunity for Each Department

Use Departmental Briefings to Better Understand the School Landscape



Step 1: Introduce Briefings to the Administrative Team

Questions to Consider:

- Does each department already complete an end of year summary that you could add supplemental questions to?
- Has the outgoing head already asked the administrative team to complete briefing documents?
- Have you been able to communicate with administrative team members already? Did you tell them about the briefings?
- If you request briefings in advance of a meeting, is there any context recipients need to understand to complete the document?
- How much time to people need to thoroughly complete this briefing document?

Step 2: Receive Complete Briefings from Department Leads



Questions to Consider:

- How will you incorporate the briefings into the opening administrative retreat?
- With who else should you share these briefings in advance of the retreat? Who can provide more context?

Step 3: Review Briefings, Determine Next Steps



Questions to Consider:

- Did you learn any sensitive issues that might warrant additional conversation(s) with faculty, staff or others?
- Do the briefings support what you learned during the search process? Are there any surprises?
- Based on what you learned what follow-up meetings or conversations will you want to have?
- Are there any immediate concerns that need to be addressed?
- Did you notice any trends across departments or functions in the briefings?
- Can you blend this into an established meeting or process?
- How can you support the vision for each department's leader?
- What do you see as the challenges and strengths across the functional groups?

Review Process:

Step 1: Discuss completed briefings with the outgoing head of school

Step 2: Follow up with department heads as needed, schedule meetings to discuss briefings if necessary

Step 3: Take time during the opening administrative retreat to discuss briefings with administrative team

Briefing: [DEPT NAME]

Please complete and return by [DATE]

In order to help the incoming head of school get a strong understanding of the school and prepared for their new role, please answer the questions below. This should not be longer than two pages.

What is your vision for the department in the next 1-2 years?



What departmental accomplishments are you most proud of this year?



What challenges is your department working to address?



Briefing: [DEPT NAME]

Please Complete and Return by [DATE]

What can I do to support you and your department?



Who are the 1-2 people I should meet with first in your department? Why?



Any additional comments?



Conduct a School-Wide Listening Tour

Customize Listening Tour Based on Capacity and Community Needs

Heads of school recommend starting your tenure with a listening tour to get to know the campus community. While there is no right or wrong way to meet with the school community, all agree that this investment of time is critical. As you get to know all the stakeholders at the school you demonstrate that you are invested in the community and in learning the unique school culture and traditions, which will serve you well throughout your tenure.

The approach you take for conducting your listening tour will be determined by the amount of time you have available to devote to these meetings. Your approach should include a mix of one-on-one meetings with key stakeholders and community forums, which allow you to meet with small groups of the same constituent type at the same time. In addition to these scheduled meetings, consider holding regular and recurring office hours where community members can stop by to talk with you.

As you think through your plan, consider varying your approach by constituent group. Use the following set of guidelines to tailor your approach to the listening tour and to make the most of each interaction.

Reach the Most Constituents in a Meaningful and Efficient Way

Individual Meetings



Appropriate Audience:

- Board members/trustees
- Administrative team
- Donors
- Faculty/staff (if possible)

Tips for Individual Meetings

- Meet with each person in their space, whether that be an office or a classroom
- Meeting in someone's space helps ensure participants are at ease and comfortable, allows you to see more of campus, and enables you to end the meeting on time by leaving

Group Meetings

Appropriate Audience:

- Students
- Parents
- Alumni

Tips for Group Meetings

- Ask the board chair to attend, introduce you, mediate, if need be, for questions beyond what is appropriate early in your tenure
- Talk to people of all levels of tenure and ages from each group to get different perspectives

Use Targeted Questions to Jumpstart Conversations

Ask All Constituents Open-Ended, But Pointed Questions to Understand School

Meeting with the key constituencies of the school community is crucial for understanding how the school functions, why constituencies are drawn to the school, and the community dynamics. Below are questions to help guide you through those conversations so you can understand the school's strengths and opportunities for growth through the eyes of all constituents.

Administrators and Staff



- What do you love about this school?
- What are your greatest challenges or frustrations?
- What accomplishment are you most proud of in the last year?
- What did not go as you hoped? Why?
- What can I do to support you?

Faculty



- What do you love about this school?
- What excites you about the upcoming year?
- What is one challenge at the school that it would be helpful to address?
- What is your most memorable moment in the classroom?
- What can I do to support you?

Board Members



- What do you love about this school?
- What are you looking forward to this year?
- How would you like to see the school grow and change over the coming years?
- What can I do to build a strong relationship with the board?

Donors



- What do you love about this school?
- What is your vision for the future of the school?
- How do you describe the school to others?
- Is there anyone you think I should meet?

Alumni



- What do you love about this school?
- How did this school challenge you or help you grow?
- What is your vision for the future of the school? How would you like to see it grow and change?
- What traditions here were your favorite?

Parents



- What do you love about this school?
- What excites your children about school?
- What is one area where you think the school can grow?
- What support do you think the head of school can offer your student?

Students



- What do you love about this school?
- What is one thing about the school you would change?
- What is one class you would like to see offered at the school?
- What do you want to see me?

External Partners



- How have you supported or partnered with the school in the past?
- Where do you see the greatest opportunity for partnership with the school?
- How can we strengthen our relationship with the community?



“It takes time and effort to get to know the school. Any information that the outgoing head tried to give me, I didn't have the context for, and it didn't make sense. And, it didn't make sense until about two years later when I fully understood the culture of the school.”

Head of School



Community Players “Dance Card”

Tool Description

Once a new head of school has been announced, various stakeholders and constituencies will want the opportunity for an audience. By building a list of key players, you will be prepared for those meetings and ready to proactively reach out and schedule important introductions. This dance card is primarily focused on building a list that extends beyond those that you employ or that attend the school.

This list mirrors guidance provided to outgoing heads of school (p. 45). If your outgoing head of school has created a “dance card” for you before their departure, use that as a starting point or compare the names on that list with the ones you collect.

Recommended Owner: Incoming Head of School

Supporters: Outgoing Head of School; Board Chair, Director of Advancement

Instructions

Use this tool to build a comprehensive list of people to meet with during the transition. As you begin the process, think about who can help you build a comprehensive list of contacts, as well as who will enable you to get a complete understanding of the school community. Follow the steps below to build this list.

- 1 Ask each board member to identify one to two people you should meet.** This will give board members a tangible way to support the incoming head of school and result in a concrete introductory network to a variety of school constituencies.
- 2 Request a list of the most important relationships for the school from the outgoing head of school and/or the director of advancement.** These two should be able to create a list of the significant donors and stakeholders in the community and offer details about their relationship with the school and expectations of the head of school.
- 3 Look for supporters who might fall under the radar.** For example, is there a volunteer who consistently offers their time and expertise to the school?
- 4 Create a conversation card to prepare for each meeting.** These cards (p. 24) will include the reasoning behind each meeting. Completing a conversation card in advance of each meeting with stakeholders on your “Dance Card.”

Community Players “Dance Card”

Determine Stakeholders to Meet With Initially

Function or Role	Name	Meeting Date	Connection Made By	Conversation Card Complete
Fire Chief				<input type="checkbox"/>
Chief of Police				<input type="checkbox"/>
Head of Local Independent School(s)				<input type="checkbox"/>
Local Businesses Leader(s)				<input type="checkbox"/>
Head of Chamber of Commerce				<input type="checkbox"/>
Head of Neighborhood Association				<input type="checkbox"/>
				<input type="checkbox"/>
				<input type="checkbox"/>
				<input type="checkbox"/>
				<input type="checkbox"/>
				<input type="checkbox"/>
				<input type="checkbox"/>
				<input type="checkbox"/>
				<input type="checkbox"/>
				<input type="checkbox"/>

Source: EAB interviews and analysis.

Community Players “Dance Card”

Function or Role	Name	Meeting Date	Connection Made By	Conversation Card Complete
				<input type="checkbox"/>
				<input type="checkbox"/>
				<input type="checkbox"/>
				<input type="checkbox"/>
				<input type="checkbox"/>
				<input type="checkbox"/>
				<input type="checkbox"/>
				<input type="checkbox"/>
				<input type="checkbox"/>
				<input type="checkbox"/>
				<input type="checkbox"/>
				<input type="checkbox"/>
				<input type="checkbox"/>
				<input type="checkbox"/>
				<input type="checkbox"/>



Conversation Cards

Tool Description

As your schedule fills up with meetings, it is important to approach each one with clear goals and expectations. Conversation cards will help you to consider each meeting's purpose in advance. By determining ahead of time what you can commit to and the goals of each meeting you will be better prepared to build productive relationships and navigate the community.

Recommended Owner: Incoming Head of School

Supporters: Outgoing Head of School; Board Chair, Director of Advancement

Instructions


Use this tool to prepare for meetings with key stakeholders. Consider each person's current and past relationship with the school, your goals for the meeting, and how you might continue the relationship in the future.


- 1 Before each meeting, complete a conversation card.** Include as much detail as possible to best prepare.
- 2 Reach out to those with institutional knowledge, as needed, to gather more information to complete the card.** The director of advancement or outgoing head of school might be able to provide additional detail or color, which could lead to a more fruitful meeting.


Conversation Cards Ensure Productive Meetings


With limited time and ability to meet with each person multiple times, you need to ensure you are getting the most out of each meeting. Consider the questions linked to each section as you complete the card for each stakeholder.

Name: _____

 **Connection to the school:** _____

 **Meeting goals:** _____

 **Ideal future communication plan:** _____

 **Additional notes:** _____

Are they a donor, former parent, reliable volunteer, etc.?
What type of relationship have they had with the school in the past?


What would you like to get out of the meeting?
What do you imagine they would like to accomplish?


How do they typically receive information about the school? Does this work well for you?
What is reasonable to commit to in terms of communications? (ex. monthly coffee meetings with one trustee could lead to an obligation that you have one with all trustees)


Is there anything else unique or noteworthy about them?
Who suggested this meeting? Why?


Build a Deck of Community Conversation Cards

Name: _____


 **Connection to the school:** _____


 **Meeting goals:** _____


 **Ideal future communication plan:** _____


 **Additional notes:** _____

Name: _____

 **Connection to the school:** _____

 **Meeting goals:** _____

 **Ideal future communication plan:** _____

 **Additional notes:** _____

Audit Calendar to Ensure First 90 Days Well Spent

Competing Time Demands Can Obscure Goals, Deplete Energy, Momentum

In the early days of your tenure, you will face a calendar filled with meetings and events. You will likely become overwhelmed and potentially lose sight of critical priorities if careful consideration is not given to the pacing and frequency of these meetings and events.

Plan out the first 90 days of your tenure to ensure that each event is the best use of your time. Most likely, the board chair will oversee much of your calendar between announcement and assuming the headship, but after that careful auditing will be beneficial. Use the following set of questions to critically assess each potential meeting, event, or engagement.

Diagnostic Questions to Assess Calendar Priorities

Question	Next Steps	Impact on Calendar
Who must I meet with now and who can I meet with later in the year?	Identify which meetings can occur beyond the first 90-days	<i>Reduction in number of meetings</i>
How am I prioritizing who I meet with and when?	Confirm there is reason for every event on calendar, clarify those you cannot justify, remove those that are non-essential	<i>Clarity behind rationale for meetings and potential reduction in number of meetings</i>
What meetings are not currently on my calendar but need to be?	Determine why these meetings are not already scheduled and then, if appropriate, schedule them	<i>Increase in meetings, but of key importance</i>
Which constituents do I need to meet with individually versus which can I meet with as a group?	Determine who can help you answer this question and then determine if there are opportunities to combine individual meetings into group meetings or events	<i>Reduction in volume of meetings, not in the number of constituents reached</i>
Am I making the best use of my time at campus events?	Work with your board chair or admin team to determine if there are any events on your calendar that are not imperative for you to attend or if some can be used to meet with constituents as well	<i>Maintain visibility on campus without setting an unreasonable precedent and use time more efficiently</i>
Am I protecting time in my schedule for myself to process what I am learning, ask questions, and engage in independent learning and reflection?	Identify how much time you would like daily or weekly for other priorities and then work with your executive assistant to protect this time on your calendar	<i>Protected time for you in the course of a day and week for reflection and to prevent your entire day from being consumed by meetings</i>
Are my priorities reflected in this 90-day calendar?	Identify your personal and professional goals for the first 90 days and first year and then check to see if you have made space for them in your days and weeks	<i>Ensures that in addition to learning about the school and meeting key constituents, you are making time and space to advance your own goals and ambitions for the first year of your headship</i>

Source: EAB interviews and analysis.



1 | Resources for Incoming Heads of School

2 | Resources for Board Chairs

3 | Resources for Outgoing Heads of School

4 | Advice from Those With Experience



Resources for Board Chairs

Overview

Your role as board chair is to be the architect of the transition. While the day-to-day tasks will fall to school staff, **you are responsible for ensuring that the community is kept informed and supported throughout the process.** You will work with the incoming head of school to coordinate visits while supporting the outgoing head as they transition to whatever comes next.

Below are four lessons, with associated guidance and tools included in this section, to help you navigate the transition period.

- 1. Stick to your role as board chair, do not try to be the head of school.** The board should not be involved in the day-to-day running of the school; while the head of school is your employee, everyone else is his/her employee. As you work closely with school stakeholders throughout the transition, remember that the role of the board (and its chair) is exclusively to govern.

Guidance and Resources:

- Ensure Consistent Governance Through Transition (p. 30)
- Build the Right-Sized Transition Committee (p. 31)
- Assign Decision Owners for Key Issues (p. 32)

- 2. Failure to establish a strong board chair-incoming head of school relationship can put the transition at risk.** Disagreement or misunderstandings related to pace of change, expectations for progress, and/or school needs between the board chair and incoming head are the primary cause of short head of school tenures. Build a strong working relationship with the incoming head and set clear expectations and goals together to ensure a successful transition.

Guidance and Resources:

- Establish Rapport with the Incoming Head (p. 33)
- Set, Agree on First Year Charge (p. 34)

- 3. The board chair should set a positive and enthusiastic tone in support of the transition and both incoming and outgoing heads of school.** Use any opportunity to show your support for the transition and assure the school community of continuity in leadership. If there is an appearance that the board chair does not support the transition, or the incoming head of school, the school will likely experience some turmoil and lack of confidence in the leadership.

Guidance and Resources:

- Set the Tone for a Successful Transition (p. 35)
- Develop Transition Communication Plan (p. 36)
- Schedule Campus Visits for the Incoming Head (p. 37)
- Continue to Share Regular Updates with Community (p. 38)

- 4. A poor experience for the head's family can sour the experience for all involved.** If the incoming head's family is well taken care of, they will be better able to focus on the school and begin their new role. Conversely, when the family does not feel welcomed it is difficult for the head of school to form a strong relationship with the school community.

Guidance and Resources:

- Support the Head's Family Through the Transition (p. 39)

Ensure Consistent Governance Through Transition

Amend Board Rules as Needed to Ensure Board Chair Remains Consistent

A successful transition requires the board chair and the head to share the same expectations and understandings. Sometimes, due to board governance models, the board chair who hires the new head is no longer the chair when the head officially starts. This turnover can result in a change in expectations or course of action that leaves either the head of school or board chair unsatisfied with the performance of the other.

To avoid this misalignment of expectations from occurring, boards should consider amending their governance bylaws to allow a board chair to serve from the search committee through the first full year of the new head's tenure.

Outlined below are three recommendations to create stable board leadership through the transition.

Three Approaches to Create Stability in Board Leadership Through the Transition

1

Amend Term Limits to Allow For Consistent Board Chair Leadership



Head of school departures and board chair tenures rarely align. To ensure continuity of board leadership and some stability throughout the transition, it may make sense for your school to **amend board rules to allow the current board chair to remain in seat from the search committee through the head's first year at the school.**

2

Name a New Board Chair Early, Prior to Start of Search Process



If term limits cannot easily be modified to allow the board chair to extend their tenure, the board should discuss whether it is appropriate for the **current chair to step down early to allow a new chair to oversee both the hiring and transition process.**

3

Establish Process for Vice Chair to Shadow Board Chair



Another option is to have a board governance model where the **vice chair shadows the chair throughout their tenure so that the vice chair is well-prepared to take over the chair position when the current chair's tenure ends.** While the head will have to build rapport with both the chair and the vice chair, this model supports continuity over many years, as the vice chair will be privy to the same conversations as the chair.

Build the Right-Sized Transition Committee

Make the Transition Committee Actually Work for the Transition

Transition committees are often too big or broad in scope to be helpful to the incoming head of school. With this structure, heads are likely to receive conflicting advice or find meetings unproductive when too many people are involved in the committee.

To address this common issue, below are two recommendations on the role of a transition committee.

Forgo the Transition Committee in Favor of Advisors, Kitchen Cabinet



Transition Committees Duplicate Efforts

The roles that transition committee members are asked to take are often already the responsibilities of an employee. By asking a transition committee member to oversee this project, **you are duplicating efforts and potentially creating unnecessary confusion over decision-making authority.**

Kitchen Cabinet Provides Targeted Guidance, Advice

Rather than establishing a transition committee with standing meetings, **advisors and kitchen cabinets can be convened on an ad-hoc basis and when needed.** An incoming head's kitchen cabinet should be composed of key members of the school community who can speak with authority on topics, and if appropriate, are the decision makers.

Members of a kitchen cabinet could include the board chair, senior administrators, board committee members, and leader of the parent committee. There may be times when its appropriate to convene the cabinet in its entirety or in part, depending on the issue.

If Committee Exists, Manage the Scope, Timeline of Commitment



Transition Committees Are Unfocused, Large, and Not Time Bound

Transition committees are often considered logical extensions of search committees. However, **these transition committees are often too large and do not have a clear role or responsibility in the transition.** As a result, the head may receive conflicting advice and priorities may not be clear.

Task-Oriented Transition Committees Know Boundaries, Scope

Limit the scope of your transition committee to only handle matters that are not part of someone else's current job. For example, the committee can generate local recommendations for the new head and family (e.g., trusted pediatrician in the area, best restaurants in the city), help to plan goodbye celebrations for the outgoing head and welcome celebrations for the incoming head. **The transition committee should be given a clear scope of work by the governing body and know when the committee has fulfilled its purpose.**

Assign Decision Owners for Key Issues

Determine Who Gets to Decide and Why

During the time between the announcement of the outgoing head’s departure and the start date of the new head, it will be tempting for the board to become involved in the running of the school. This is not the board’s role. As the board chair, you hold the power to decide who has final say on a decision (incoming or outgoing head of school). This assignment of decision makers should be handled on an issue-by-issue basis. You do not want to overwhelm the incoming head with decisions they are not prepared to make, nor do you want to undermine the authority of the outgoing head.

Below are five common decision-making areas and guidance on deciding who should be involved in the decision-making process for each area.

	Incoming Head	Outgoing Head	
Personnel Matters	<input type="checkbox"/>	<input checked="" type="checkbox"/>	Current head decides and informs the incoming head if the handling of a matter, like a termination, might continue to have an impact or be a topic of conversation into the new head’s tenure.
Hiring Decisions	<input type="checkbox"/>	<input checked="" type="checkbox"/>	If the position does not report directly to the head, proceed with normal hiring procedures.
	<input checked="" type="checkbox"/>	<input type="checkbox"/>	If the position does report directly to the head of school and the incoming head has sufficient knowledge of the school and the position to successfully hire for the position.
	<input type="checkbox"/>	<input checked="" type="checkbox"/>	If the position reports directly to the head of school but the incoming head does not have sufficient knowledge to hire for the position, the outgoing head may be best positioned to fill the position or name an interim.
Student Discipline	<input type="checkbox"/>	<input checked="" type="checkbox"/>	Disciplinary issues should be handled by the outgoing head of school. The incoming head of school only needs to know about it if there is potential legal action or other ramifications.
Future-Looking Matters	<input checked="" type="checkbox"/>	<input type="checkbox"/>	These should be left for the incoming head to decide, whenever possible. For example, a new strategic plan, any land acquisitions, or large improvement projects should be delayed until the new head arrives.
Legal Issues	<input type="checkbox"/>	<input checked="" type="checkbox"/>	Legal matters are best addressed by the current head of school in consultation with the board chair, but it is imperative that the incoming head of school be included when possible.

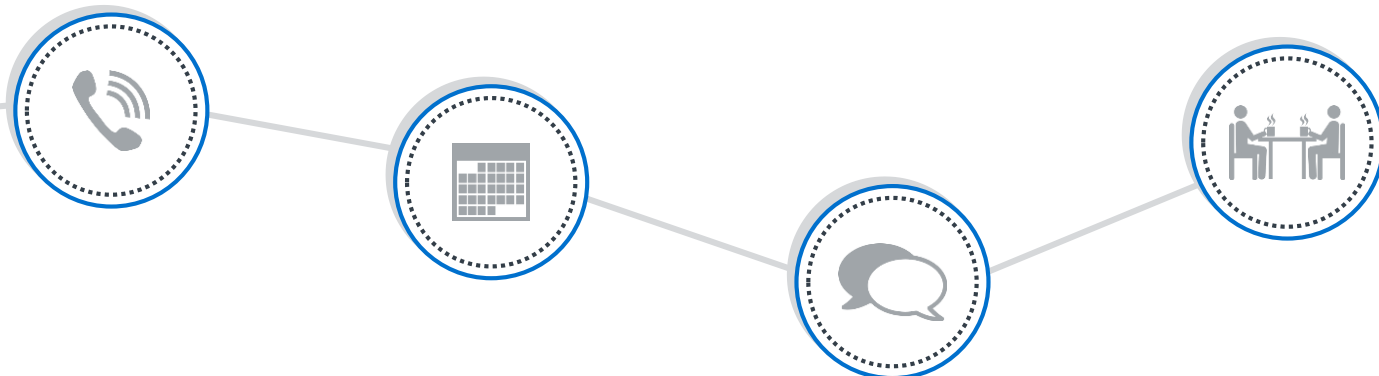
The incoming head should be fully aware of any current legal issues as well as any prior issues that could resurface and the past legal history of the school. Give the incoming head an opportunity to ask questions of the people with the greatest knowledge of these matters.

Establish Rapport with the Incoming Head

Strong Board Chair – Head of School Relationship Critical to Success

Your relationship with the incoming head of school is the most critical one for their success. While you are likely to have started building rapport with the incoming head as part of the search process, strengthening and solidifying this relationship over the first year is imperative.

Below are four ways to build your relationship from the time the new head is announced through their first year.



Schedule a Standing Weekly Call

Establish a routine for regular, weekly communication as soon as the new head of school is named.

Find a time that works well for both of you – after the workday and after any evening commitments the incoming head may have.

Build agendas together so mutual questions and topics are covered, including understanding key issues at the school and planning for the future.

Set Expectation for Open and Transparent Communication

Establish norms and protocols immediately to set your relationship up for success. Be clear about the degree of communication you expect and the level of transparency you want.

Set yourself up for success. Too often, headships fail because of poorly aligned and articulated expectations.

Encourage Monthly Campus Visits

Plan for monthly or bi-monthly campus visits, prior to their official start date, to help the incoming head build a connection to the campus and attend key campus events and milestones.

Use these campus visits for face-to-face meetings with key constituents and meeting time with you.

Establish a Personal Relationship

Find points of commonality outside of the work.

Spend time together off campus engaged in an activity you both enjoy can help build collegiality as well as a deeper understanding of each other, which will be to the benefit of your working relationship. Ideas to consider include attending sporting events, going to a museum, dining at a favorite restaurant, etc.

Set, Agree on First Year Charge

Align Board, Head Expectations While Sending Clear Message to Community

While you and the incoming head of school have had many conversations about the vision and goals for the school during the interview process, you may not have taken the time to discuss concretely what you would like to see the head accomplish in their first year. Setting goals will provide guardrails in the first year to make sure you are aligned in terms of priorities and expectations for the new head.

The following guidance on creating a strong charge for the incoming head of school is also included in the incoming head of school guidance in this playbook.

Tips for Setting A First-Year Charge



Limit the Number of Goals

Keep the number of goals manageable. More than 3-4 goals will be hard to accomplish in one year and potentially leave the impression of trying to change too much too quickly.



Manage the Scope of Goals

Set two types of goals: goals focused on learning the school and its community and goals focused on supporting the school's growth and implementing changes.



Define the Duration of Goals

Ensure that some goals can be accomplished in the first year and delineate which ones will take more time to complete, despite initial progress.



Monitor the Progress of Goals

Update the board on your progress toward each goal at board meetings so they receive regular communication and can help troubleshoot or modify goals on an ongoing basis, rather than at year's end.



Discuss the Transparency of Goals

Determine which goals are sensitive and should be confidential to avoid causing anxiety in the school community versus those which should be shared broadly to communicate the vision and expectation for the new head. Goals related to restructurings, changing traditions, or other practices are often best kept private while goals around community building and capital campaigns, among others, should be shared.



Share Appropriate Goals with the Community

Share the first-year goals that are appropriate and relevant with the community. This transparency will help level set expectations for you in your first year, signal unity of vision with that of the board, and help keep the community from pushing for other priorities to be addressed in your first year.

Source: EAB interviews and analysis.

Set the Tone for a Successful Transition

Board Chair Should Lead the Way in Welcoming New Head of School

In a time of transition, the board needs to clearly demonstrate their support for the new head of school to help set the tone and expectations for the community. If the school community realizes that the board is supportive of the head, they are less likely to be overly critical of the new head and more willing to accept that the board and head of school have a plan that they are working on together.

The graphic below shows how you can demonstrate support for the incoming head of school.

Ways to Signal Support, Enthusiasm for New Head of School Across the First Year



After Being Named

Communicate Enthusiasm in Writing and in Person

In your announcement of the new head of school, **share what excites you about the new head and forecast the contributions you expect to see happen in the first year** or coming years. Begin to signal the changes that you anticipate will happen without raising alarm.



In First Months

Attend Campus Events with the New Head

In the early days of the new head of school's tenure, make sure to **attend events alongside the head whenever possible** to help introduce them to people, to continue to monitor how the community interacts with the new head, and support the new head by being available to answer questions.

Help manage the scope of any questions that are asked and **demonstrate that you are a team by working together.**



In First Year

Help Manage Expectations

Monitor the needs of the community and new head of school to see if you need to provide additional support to new head or if you need to send additional communications to **help the community better understand the role of the incoming head during the transition year**

Show Support by Attending Events with the Incoming Head of School

"As soon as possible, we hosted a series of meetings, **most of which I attended and introduced the incoming head of school.** I reminded people about how the process had gone, and how and why we chose our new head. The incoming head of school then gave extremely thoughtful and eloquent preliminary remarks and got to know our school community."

Board Chair

Develop Transition Communication Plan

Plan Ahead to Maximize Use of Incoming Head's Limited Time

Once the new head of school has been selected, you must work with them to plan what the next few months will look like, from making a formal announcement to welcoming them to campus on their first day. The incoming head of school will likely have some initial ideas about what they want to know and who they want to meet, but only you can help them learn the inner workings of the school and community.

Use the questions and guidance below to plan your communications strategy for the new head of school.

Questions to Answer Before the Incoming Head of School's First Official Day



Making the Announcement

How are we going to announce the appointment of a new head of school?

Will the introduction be in person?

Will I write a letter to the community?



Planning the Initial Introduction

How visible do we need the incoming head of school to be on campus initially?

Will they be available for a "meet and greet" on campus immediately after being named incoming head of school?

Should we make a video to introduce the incoming head to campus?

Do we want the incoming head to write a letter to the community? If so, when do we plan to release it?



Navigating the Time Between Announcement and Start Date

After the initial announcement, how frequently do we need the incoming head to be on campus?

Who does the incoming head need to meet with and what do they need to know about the school prior to the first day on the job?

What time works for a standing weekly call with the incoming head of school?



Celebrating the Transition

How should we celebrate the outgoing head's departure?

How can we involve alumni in this process?

How should we welcome the incoming head on their first official day on the job?

How should we celebrate the new head when students return in the fall?

Schedule Campus Visits for the Incoming Head

Plan Campus Visits Early to Help Acclimate New Head, Increase Visibility

In the months before the incoming head's start date, you should set a goal of having them visit monthly or every other month to increase familiarity with and visibility on the campus.

Consider the context of your search process, closed or open, when planning these visits. After a closed search, the community has little familiarity with the incoming head and may feel wary of them. To help the community get to know the new head, host open forums and meet-and-greets where the new head can introduce themselves and field general questions, none related to school policy or current issues. For those with an open search, focus on deepening relationship and meeting a broader array of constituents.

The school and the incoming head both benefit from the incoming head spending time on campus prior to their official start date. Aligning campus visits with key events or traditions further allows the incoming head to see the school in action and lets the community see the incoming head in an informal capacity.

Use the four following sets of questions to design a productive series of new head of school visits.

Key Questions to Ensure the Best Use of the Incoming Head's Visits to Campus

1

Consider the Timing for Both the School and the New Head



- What key campus events should the new head see?
- Does the new head need to come for one day or multiple days?
- Am I asking the new head to come to campus too frequently?
- Is this a difficult time of the year for the new head to leave their current job responsibilities for a day(s)?

2

Develop a Meaningful Agenda in Advance



- In addition to attending campus events, what other activities or meetings should the new head do during this time?
- Are there any sensitive conversations I should have while the incoming head is on campus?
- Have I checked the calendars of others to ensure they can meet during this time?

3

Define Roles, Expectations for Outgoing, Incoming Head



- Does the incoming head have a clear understanding of what role they are to play at campus events?
- Does the current head understand their role and know their authority is not being undermined?
- How will I message to the community the new head's attendance?

4

Identify Opportunities to Expand New Head's Network



- Will any key stakeholders be attending campus events? Should they meet with the incoming head?
- Is there a constituency that does not feel like it is getting enough time with the head?
- Is there a constituency that I need to ensure does not dominate the incoming head's time?

Continue to Share Regular Updates with Community

Sharing Information Keeps Community Invested in Successful Transition

Every stage of a transition requires a careful communications campaign to ensure that speculation about change does not sour what is often a time for celebration and exciting change. Continue to update the community throughout the transition to ensure that people remain positive about the change and that there are not different narratives circulating about the reason of the change or rumors about the new head of school. The board chair should work with the director of communications to develop easily digestible messaging around the transition. This should build on the updates provided on your website.

Below is guidance on messaging for the community.

Determine Key Messaging Points, Constituencies to Address

Points to Cover

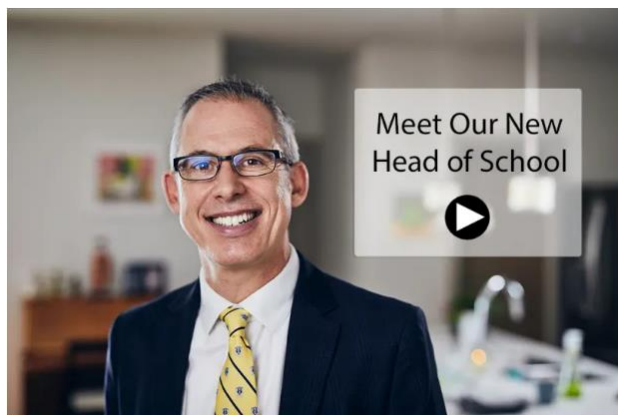
- The accomplishments of the outgoing head
- Why the incoming head is the right person for the school and the job at his time
- What to expect in the first year with the new head of school
- Answers to any commonly asked questions



Constituents to Reach

- Faculty and staff
- Administrative team
- Board of Trustees
- Parents
- Alumni
- Donors

Create Opportunities for the Incoming Head of School to Address the Community



Full video available on The Pingry School's [website](#).

Create a short video with incoming head of school where they can introduce themselves and share a message directly with the community

Questions and topics to consider covering include:

- Tell us about your family
- Tell us about your professional background
- What is your educational philosophy?
- Why is education important to you?
- How do you build community?
- What drew you to our school?

Harness the Power of Word of Mouth

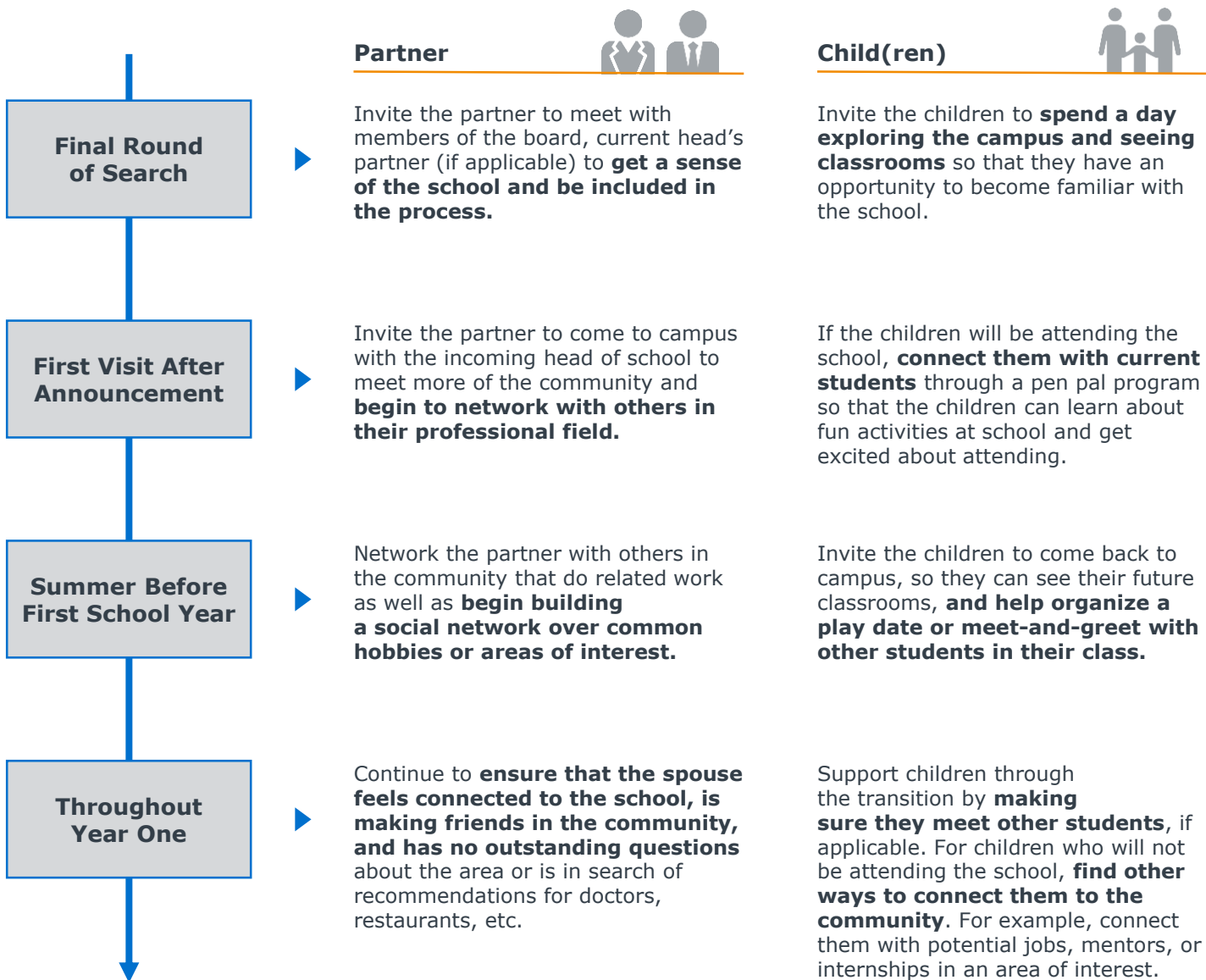
Use EAB's [Word of Mouth Toolkit](#), with special attention to the guidance for [Clarify Your School's Messaging](#), to refine your message and package it for key members of the community to easily disseminate information throughout the community.


Support the Head’s Family Through the Transition

Happy Family, Happy Head of School

An often overlooked, but critical component of a successful transition is making the incoming head of school’s family feel welcome and connected to the community. When the head of school is distracted by family matters, the school is not getting their full attention. Heads of school note that if their family feels welcomed and settled in the new community, they also feel comfortable in the new environment. Therefore, the community needs to actively engage the whole family.

Use the suggestions below to welcome and involve the new head of school’s family.



Use Transition Committee To Support the Whole Family 

If your school has an expansive transition committee, **use them and their connections to help the family network professionally and socially with the community.** This networking is especially important if the family has relocated for this job. The transition committee can host events for the family in addition to setting up individual meet-and-greets and other social activities.



1 | Resources for Incoming Heads of School

2 | Resources for Board Chairs

3 | Resources for Outgoing Heads of School

4 | Advice from Those With Experience



Resources for Outgoing Heads of School

Overview

As outgoing head of school you are responsible for ensuring that the school continues to serve all stakeholders well during the transition. There should be no decline in performance or concern about school leadership during this time. You are leading the school and can support the incoming head by sharing your experience and expertise.

Below are three lessons, with associated guidance and tools included in this section, to help you navigate the transition period.

- 1. Leave the school as you would like to inherit it.** Address any and all personnel concerns, including necessary staff terminations, before you depart. The incoming head of school will not have the political clout, nor the requisite institutional knowledge, to address such issues initially. If possible, address any outstanding housekeeping items before your final day in seat. This includes, but is not limited to, outstanding tuition or rent payments, up-to-date certifications, etc.
- 2. Alert the incoming head of school to any recent difficult decisions or potential future concerns.** You are in the best position to ensure that the incoming head of school is not faced with any unfortunate surprises on their first day.

Guidance and Resources:

- *Tool:* Deck of “Landmine” Cards (p. 42)

- 3. Share the wealth of connections and school-specific knowledge gathered over the course of your tenure as head of school to support their tenure and your school.** During your tenure you’ve formed deep relationship and mapped your own network of the community. The incoming head will need to form these relationship on their own, but you can help identify where to start.

Guidance and Resources:

- *Tool:* Community Players “Dance Card” (p. 45)
- *Tool:* Departmental Briefings (p. 48)

- 4. Tie up loose ends and celebrate a job well done.** Gather your administrative team one final time to show your appreciation and ensure everything is set for the new head to assume their role. Take time to celebrate the hard work that you and your team have done during your tenure as head of school.

Guidance and Resources:

- Closing Administrative Retreat Planning Guide (p. 52)



Deck of “Landmine” Cards

Tool Description

Over your tenure you have handled good times and bad. While others on your team will have institutional knowledge, you are the keeper of things that might be most pertinent to the incoming head of school. Providing them with additional information about any “hot button” issues in the community can help prepare the new head and get them up to speed.

Use this template to create a resource for the incoming head of school to help them navigate potential landmines that they may encounter early in their tenure.

Recommended Owner: Outgoing Head of School

Instructions

Use this tool to prepare the incoming head for issues they might encounter early in their tenure. Consider what details you would want to know about each issue and detail those for the incoming head of school.

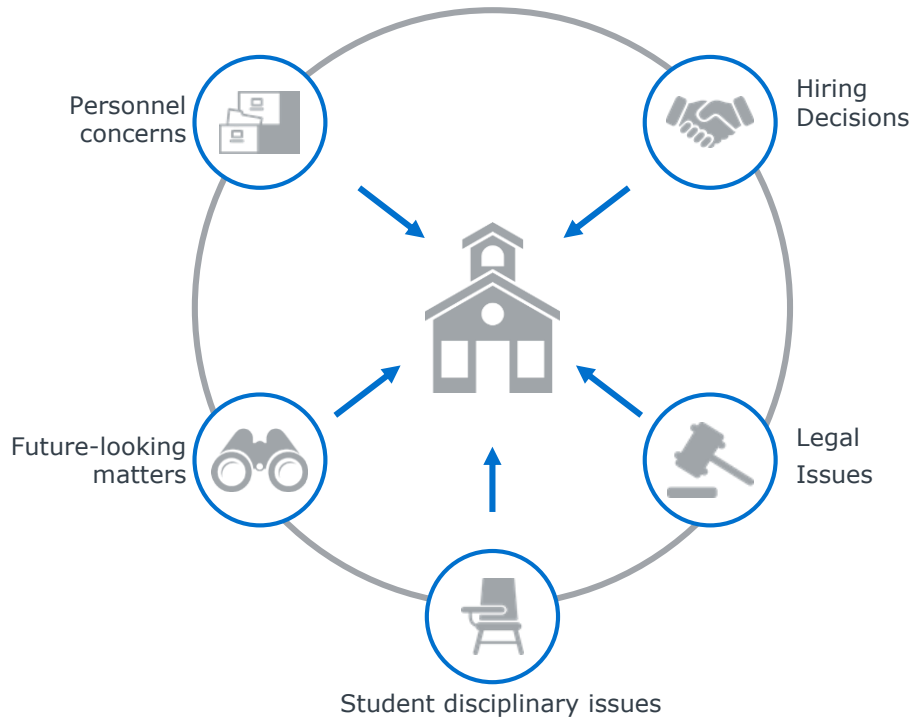
- 1** Create a list of “hot button” issues that have captured the school community recently and those you see in the future. This should be as comprehensive as possible and give the incoming head the knowledge to have a conversation about each one and know who to reach out to for more information. The next page (p. 43) contains an overview of common “hot button” issue areas.
Many outgoing heads of school report addressing underperformance before leaving the school. If the school has recently parted ways with someone it will be helpful to note that for the incoming head of school.
- 2** Complete a landmine card (p. 44) for each issues you’ve identified. The more detail you can provide, the better.
- 3** Share completed deck of “landmine” cards with incoming head. If possible, schedule time to meet with the incoming head, after they’ve reviewed the deck, to answer questions they might have. Alternatively, identify who can provide additional information or context in the “additional notes” sections.

Use “Landmine” Cards to Prepare Incoming Head

Make Sure the Incoming Head Has the Information to Begin Their Tenure


Consider “hot button” issues that have captured the school community recently and those you see in the future. These cards should be as comprehensive as possible and give the incoming head the knowledge to have a conversation about each one and know who to reach out to for more information.

Common “Hot Button” Issues




Complete “Landmine” Card for Hot Button Issues

“Hot Button” Issue: _____



Details: ● _____


What does the incoming head of school need to know about this issue or concern?




Key Players/Stakeholders: ● _____

Consider the following:

- Who is currently involved in this issue?
- Who should the incoming head include?
- What are their positions and views?




Urgency: _____



Should be Addressed: ● _____

Immediately 1-3 months 3-6 months

How soon will the incoming head need to act? If possible, explain the timing recommendation.



Additional notes: _____

Source: EAB interviews and analysis.

Use “Landmine” Cards to Prepare Incoming Head

“Hot Button” Issue:



Details:



Key Players/Stakeholders:



Urgency:

Should be Addressed:

- Immediately 1-3 months 3-6 months



Additional notes:

“Hot Button” Issue:



Details:



Key Players/Stakeholders:



Urgency:

Should be Addressed:

- Immediately 1-3 months 3-6 months



Additional notes:



Community Players “Dance Card”

Tool Description

Once the new head of school has been announced school community members will want to meet them. Build a list of key constituents ahead of time to prepare the incoming head for initial meetings. You have a wealth of background knowledge and relationships with key players, sharing this will benefit the incoming head as they settle into the school community.

This tool mirrors one provided to incoming heads of school (p. 21). By creating this list prior to your departure, you will give the incoming head a solid list to start with and to build on.

Recommended Owner: Outgoing Head of School

Supporters: Board Chair, Director of Advancement

Instructions

Use this tool to build a comprehensive list of suggested initial meetings for the incoming head of school. As you begin the process, think about who the incoming head should meet with in order to gain a complete picture of the school.

- 1** Identify who you think the incoming head should meet with. Include those who you trust on campus to give an honest assessment of the institution and those who might fall under the radar. Think about people that you turn to on to drum up support for a flagging campaign, that you call when you want to learn about the parental response to a change, or others who might not immediately be obvious to the incoming head. Use this to build a list of stakeholders for the incoming head to meet.
- 2** Determine the priority level for meeting with each stakeholder and include any relevant notes or background they should know about this person.

Community Players “Dance Card”

Determine Who the Incoming Head Should Meet Initially

Function/Role	Name	Notes for the Incoming Head of School	When Should They Meet?
Donor	Jane Doe	Jane is someone you can always turn to when you need to generate excitement for a campaign	<input checked="" type="checkbox"/> As soon as possible <input type="checkbox"/> 1-3 months <input type="checkbox"/> 3-6 months
Former Board Chair	John Smith	John was the board chair during my transition and still has clout with the board. He is both an alum and parent of alums.	<input checked="" type="checkbox"/> As soon as possible <input type="checkbox"/> 1-3 months <input type="checkbox"/> 3-6 months
Parent	Wilma Flintstone	Wilma is everywhere and knows everyone – she has a network of parents that she can get excited to volunteer for any event	<input type="checkbox"/> As soon as possible <input type="checkbox"/> 1-3 months <input checked="" type="checkbox"/> 3-6 months
			<input type="checkbox"/> As soon as possible <input type="checkbox"/> 1-3 months <input type="checkbox"/> 3-6 months
			<input type="checkbox"/> As soon as possible <input type="checkbox"/> 1-3 months <input type="checkbox"/> 3-6 months
			<input type="checkbox"/> As soon as possible <input type="checkbox"/> 1-3 months <input type="checkbox"/> 3-6 months

Consider the following questions when writing your notes to the incoming head of school:

- Why did you suggest they speak with this person?
- What kind of relationship have they had with the school in the past (e.g., “I call this person with good news, because they are ardent supporters and will spread the good news”)?
- How did you typically interact with this person (are they accustomed to getting emails weekly, etc.)?
- Are there any pet issues or concerns this person has that the incoming head should know (e.g., “Jane is very concerned about environmental sustainability, prepare for this meeting by refreshing yourself on our green policies”)?

Community Players “Dance Card”

Function/Role	Name	Notes for the Incoming Head of School	When Should They Meet?
			<input type="checkbox"/> As soon as possible <input type="checkbox"/> 1-3 months <input type="checkbox"/> 3-6 months
			<input type="checkbox"/> As soon as possible <input type="checkbox"/> 1-3 months <input type="checkbox"/> 3-6 months
			<input type="checkbox"/> As soon as possible <input type="checkbox"/> 1-3 months <input type="checkbox"/> 3-6 months
			<input type="checkbox"/> As soon as possible <input type="checkbox"/> 1-3 months <input type="checkbox"/> 3-6 months
			<input type="checkbox"/> As soon as possible <input type="checkbox"/> 1-3 months <input type="checkbox"/> 3-6 months
			<input type="checkbox"/> As soon as possible <input type="checkbox"/> 1-3 months <input type="checkbox"/> 3-6 months
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			<input type="checkbox"/> As soon as possible <input type="checkbox"/> 1-3 months <input type="checkbox"/> 3-6 months
			<input type="checkbox"/> As soon as possible <input type="checkbox"/> 1-3 months <input type="checkbox"/> 3-6 months



Departmental Briefings

Tool Description

A collection of briefings on each department will help the incoming head of school understand the school landscape and prepare them to talk about the school's amazing offerings with authority. It will be helpful to work with your administrative team to get an idea of the current status of each department in the school and prepare for the incoming head of school's transition. Departmental briefings are 2-page documents written by your administrative team for you.

This tool mirrors guidance for the incoming head of school on using departmental briefings to get to know the school.

Recommended Owner: Outgoing Head of School

Supporters: Administrative Team

Instructions

Briefing documents are short summaries of key points for each department at that school. You should collect one from all departments and functions at the school.

These briefing documents should come from all major departments and functions at the school, including admissions, advancement, enrollment, athletics, operations, facilities, business, student support services, etc. The first page includes details and questions to consider throughout the briefing process, as well as ways to customize the process to suit your school. A briefing template follows.

Process to Collect Briefings

- 1 Ask the leader of each department to complete a briefing document.** This will give the incoming head of school a strong background into each department.
- 2 Review the briefings and address any immediate concerns.** If something is surfaced in the briefings that must be addressed immediately, share the issue and your response with the incoming head of school.
- 3 Share the briefings with the incoming head of school.**

Departmental Briefings Worksheet

Briefings Cover Strengths and Areas of Opportunity for Each Department

Use Departmental Briefings to Better Understand the School Landscape

Step 1: Introduce Briefings to the Administrative Team



Questions to Consider:

- Does each department in the school already complete an end of year summary that you could add supplemental questions to, or share with incoming head of school?
- If you request these briefings in advance of the retreat, is there any context recipients need to understand to complete the document?
- How much time to people need to thoroughly complete this briefing document?
- Does any department need to include additional data or information to complete a snapshot for the incoming head of school?

Introduction Options:

- Option 1:* Request each department complete a briefing to share with incoming head of school
- Option 2:* Request team complete briefings to discuss at your closing administrative retreat

Step 2: Receive Complete Briefings from Department Leads



Questions to Consider:

- How will you incorporate the briefings into the opening administrative retreat?
- Are there issues that you saw in the departmental briefings that you should address prior to leaving? Anything you should flag for the incoming head?

Step 3: Review Briefings, Determine Next Steps



Questions to Consider:

- Did you learn of any sensitive issues that might warrant additional conversation(s) with faculty, staff or others?
- Do the briefings support what you learned during the search process? Are there any surprises?
- Based on what you learned what follow-up meetings or conversations will you want to have?
- Are there any immediate concerns that need to be addressed?
- Did you notice any trends across departments or functions in the briefings?
- Can you blend this into an established meeting or process?
- How can you support the vision for each department's leader?
- What do you see as the challenges and strengths across the functional groups?

Review Process:

- Step 1:* Discuss completed briefings with the incoming head of school
- Step 2:* Follow up with department heads as needed, schedule meetings to discuss briefings if necessary
- Step 3:* Take time during the closing administrative retreat to discuss briefings with administrative team

Briefing: [DEPT NAME]

Please complete and return by [DATE]

In order to help the incoming head of school get a strong understanding of the school and prepared for their new role, please answer the questions below. This should not be longer than two pages.

What is your vision for the department in the next 1-2 years?



What departmental accomplishments are you most proud of this year?



What challenges is your department working to address?



Briefing: [DEPT NAME]

Please Complete and Return by [DATE]

What can I do to help you and your department prepare for the transition?



Who are the 1-2 people the incoming head of school should meet with first in your department? Why?



Any additional comments?





Closing Administrative Retreat Planning Guide

Tool Description

During a period of transition it is important that the school's administrative team is supported and sees a continuation of leadership. There should be no power vacuum, perceived or otherwise. To demonstrate continuity, the school should host two administrative retreats: a closing retreat with the outgoing head, an opening retreat with the incoming head. This tool will guide the planning process for said administrative retreat and complements the guidance given to incoming heads of school on hosting their opening administrative retreat at the school.

Recommended Owner: Outgoing Head of School

Supporters: Administrative Team

Instructions

Use this tool to guide your planning for the closing administrative retreat. It should take place during your final month in seat and mirror one hosted by the incoming head of school during their first month in seat.

- 1** Plan a closing administrative retreat to occur in your final month on the job. Set goals for your retreat and use the guidance on the next page (p. 53) to ensure a successful meeting. Determine how you will incorporate departmental briefings (p. 48) into the retreat.
- 2** Develop an agenda for your administrative retreat. Use the sample agenda (p. 54) to build out the schedule for the day.
- 3** Use the retreat checklist (p. 55) to ensure all logistics are set.

Use Retreat to Build Foundation for Next Year

Guide to Leading A Successful Closing Administrative Retreat



1 Prepare for the Retreat

Plan Logistics, Set Goals for Retreat

Questions to Ask During Planning

- How well does the administrative team work together?
- Are there challenging group dynamics you can try to address before the incoming head's arrival?
- How will you use departmental briefings? Should they be completed in advance, or will you dedicate time to work on them during the retreat?
- What team building activities can you lead?
- Will you bring in an outside facilitator for any activities?
- How will you celebrate the excellent work your team has done during your tenure as head of school?
- Should the retreat conclude with a celebratory cocktail party or dinner? Could you host this at your home?

Related Tools and Activities



Departmental Briefings (p. 48)

Solicit completed departmental briefings to gain insight, useful background information



Retreat Agenda & Checklist (p. 54-55)

Review checklist to ensure all logistical details are set for the retreat, create retreat agenda

2 Use Retreat To Tie Up Loose Ends, Celebrate



Focus Conversations, Activities on Looking Forward While Celebrating Accomplishments

Consider Ways to Show Your Appreciation, Celebrate Tenure

- Dedicate time during the day to talk about accomplishments of each team, legacy you leave
- Write a note of gratitude to each member of the administrative team and give it to them along with a small token of your appreciation (e.g., a framed photo of the team or the school)
- Host a dinner, at your home or on campus, to conclude the day; invite partners to join for this occasion

3 Build on the Momentum of the Retreat



Develop Action Items, Next Steps For a Smooth Transition

Potential Next Steps Following Retreat

- Consolidate results of the briefings (what is needed for each department's transition, etc.) into a single document for the incoming head of school
- Create a document to share with the team outlining how you will use the results of the retreat, what will be shared with the incoming head of school
- Begin implementing the transition ideas surfaced during the retreat and in briefings

Closing Administrative Retreat Sample Agenda

Administrative
Retreat [YEAR]

Attendees:

- 7:30 am **Arrival**
Light Breakfast
- 8:00 am **Team Building Activities**
- Introductions
 - Ice breaker and team building activities
- Break*
- 9:30 am **Discussion Department Briefings**
- Finalize and reflect on each department's briefing document (template attached)
- 10:30 am **Review Departmental Needs for Transition**
- Discuss what each departments would like to see during the transition period
 - Identify how departments can support and be supported by the incoming and outgoing head of school
- 12:00 pm **Lunch**
- 1:00 pm **Looking Forward to the Next Year**
- Review forward-thinking portions of each department's briefing
 - Determine how we can support goals across the school
- Break*
- 3:30 pm **Team Building and Reflection**
- Conduct team building activities
 - Reflect on the day's activities, as well as our accomplishments as a team
- 5:00 pm **Conclusions and Next Steps**
- Discuss next steps and immediate action items

Closing Administrative Retreat Checklist



Meals, Location

Meals have been accounted for, as applicable

Space is reserved

Space is set up for the retreat



Materials

Participants have been asked to complete the briefing, if applicable

Briefings have been collected, if applicable

Materials needed for team building activities ready, if applicable



Agenda

Agenda has been set (see sample provided for guidance)

Celebration is planned and all necessary materials procured

Agenda shared with attendees



Miscellaneous



1 | Resources for Incoming Heads of School

2 | Resources for Board Chairs

3 | Resources for Outgoing Heads of School

4 | Advice from Those With Experience

Advice from Those with Experience

.....

In the course of this research, we spoke with many people involved in recent head of school transitions: interim heads of school, outgoing heads of school, new heads of school, as well as their board chairs, administrators, and executive search consultants. In total, we interviewed 25 people: 18 heads of school, four board chairs, and three independent school experts.

Below is some of the advice they would impart on others preparing the head of school transition.

.....



Advice to Incoming Heads from Other New Heads

“The school will judge the new leader based on how they spend their time. You need to be seen by students, teachers, parents, and have those exchanges. They need to know that you are fully invested in the life of the school...**You signal your priorities in how you spend your time.**”

Head of School

“If you’re not strategic **the job will eat you**, because there are so many audiences that want a piece of you. **You should look at your day and figure out the best use of your time.**”

Head of School

“**Meeting with as many constituents as possible is going to take time, but it’s time well spent.** It is important to know what brought them to your school and learn a bit about who they are.”

Head of School



Advice on How to Support the Incoming Head of School

“You want to do enough, but not too much. **You don’t want to treat the incoming head like they’re an employee, when they’re not.** Its important to remember that in many cases they are still working somewhere else.”

Head of School

“As board chair, **the most important thing is to focus on the entire family, not just the incoming head.** Ultimately it will make the head more successful if everybody (the kids, the spouse, whomever) feels like they are all part of the process. It’s hard and it’s time consuming, but if you want the transition to be successful you have to do it.”

Board Chair

“Each tier of leadership needs to ask themselves, **‘What are my opportunities to make this transition successful?’** How can I communicate what the new head is doing or wants to do?”

Head of School

Advice from Those with Experience



Advice On the Role of the Board Chair and Board

“You have to be out front. **You’re making sure that the needs of the incoming head are attended to.** So, its little things and big things. It’s setting up meetings with the appropriate constituencies. **It’s making sure that the family is also taken care of.** I would call it almost bridge building or acting as a concierge to **make sure the needs of the family are addressed.**”

Board Chair

“My major message to the board is to **allow the incoming head to lead with their own style.** I’ve done it one way, and I’ve had a good run, but that doesn’t mean that the next person has to do it the same way. Get rid of the message of ‘maintain and sustain,’ because **you also want to leave room for change and innovation.**”

Head of School

“The board has to walk a fine line during transitions, because they are more involved and inclined to become more active in the school’s functioning. And **they do not have a role in the day-to-day life of the school.**”

Independent School Expert

“One of the things to think about, is that in your zeal to introduce the new head, the old head doesn’t feel like yesterday’s news. **Celebrating an arrival and a departure should be balanced.**”

Board Chair



Advice on the Role of the Outgoing Head of School

“During the transition, **it’s important to keep your ego in check** and support the process.”

Head of School

“**The best thing the departing head can do for the new head is to protect them as long as possible.** They should keep people from over-communicating with the incoming head, while giving them as much **behind-the-scenes access** as possible.”

Head of School

“One of the really interesting realities of this process is that most of us only do this once. So, **we don’t have a chance to get better at the transition itself.**”

Head of School



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