EAB

TOOLKIT

Head-worthy Tasks Toolkit: Reassessing the Work of the Head

Independent School Executive Forum

Learn to recalibrate your current tasks, delegate tasks that are not head-worthy, and communicate your recalibrated tasks to stakeholders.

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Recalibrating Head-worthy Tasks

SECTION I

Recalibrating Head-worthy Tasks

Introduction

As operating independent schools has grown more complex in recent decades, heads of school have taken on the management of tasks beyond those of the traditional headmaster to include the financial, operational, and strategic work of CEOs. As a result, the volume and breadth of responsibilities for which heads are accountable have increased tremendously.

While heads play a critical role as the ultimate source of authority and decision-making at independent schools, they are often asked to provide input on tasks and decisions that are now out of scope in the context of their modern-day roles. This is often a vestige of a past era of the headship, when heads were involved in all types of decision-making—both large and small—and had more time to devote to doing so. As one head put it, "One of the things heads traditionally do is that they want their hands in everything. They're the head, so they want to do it all."

"Should masks be recommended or required at school functions?"

"Which of these final candidates should we select to teach middle school history?"

"Can we put off repairing the upper school dining hall for another year?"

Daily Decisions of a Head of School

"What color balloons should we order for 8th grade graduation?"
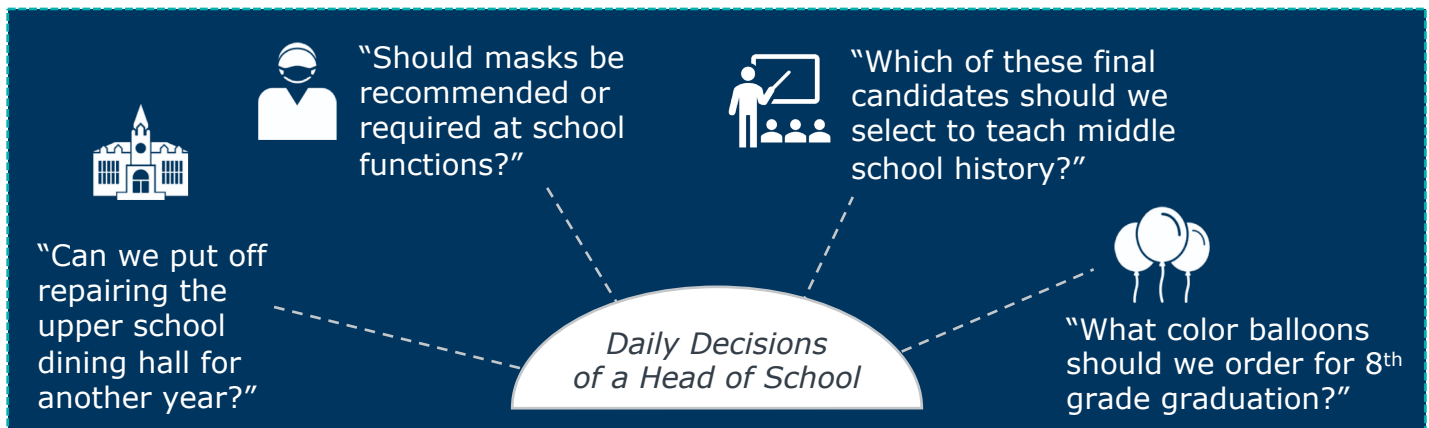
In our research, we found that today's heads recognize that "doing it all" is not only unsustainable, it is also not desirable. In fact, heads acknowledge that being involved as an authority on too many issues may result in the following consequences:

1 Dealing with less consequential issues at the expense of more important matters that **only heads** can attend to; and

2 Weighing in on issues where they may not have the greatest expertise, even if they have the authority.

Unfortunately, many heads we interviewed in our research struggle to be intentional about creating boundaries around which tasks and responsibilities they take on and which they delegate based on the need to attend to the work only *they* can do as heads of school. Since the demands upon heads' time is greater than ever, heads must be purposeful in creating boundaries around where they focus their time and energy, and deliberate in delegating non-head-worthy tasks to other leaders within the school.

Sources: EAB interviews and analysis.

Exercise: Recalibrating Head-worthy Tasks

Step I: Instructions

Based on our research interviews with heads of school, EAB has outlined criteria for helping to determine which tasks and responsibilities are and are not "head-worthy" in alignment with the expectations of a modern-day head of school.

Begin by reviewing the tasks listed in the two boxes below, and then complete the self-assessment introduced on the following page.

✔

HEAD-WORTHY CRITERIA

Tasks, Responsibilities that *Only* the Head Can Do

- *Task/group of tasks that directly impact the mission/vision of school*
- *Task/group of tasks that align with the head's leadership strengths/ style/expertise*
- *Task/group of tasks with high community expectations*
- *Task/group of tasks with high board expectations*
- *Task/group of tasks requiring authority from the head*

Tasks, Responsibilities that the Head *Could* Do

- *Task/group of tasks that keep the head informed or in sync with key stakeholders (e.g., community events)*
- *Task/group of tasks that provide strong motivation for the head or bring the head joy (e.g., co-teaching classes, working with student leaders)*

✖

NON-HEAD-WORTHY CRITERIA

Tasks, Responsibilities that *Others* Should Do

- *Task/group of tasks that someone else can do better/has more expertise*
- *Task/group of tasks for which others have greater capacity*
- *Task/group of tasks where success/failure is not an existential threat (i.e., not related to value proposition, growth of endowment)*
- *Task/group of tasks not perceived as high priority by key stakeholders*

These tasks and responsibilities should be delegated to other leaders whenever possible

Source: EAB interviews and analysis.

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Exercise: Recalibrating Head-worthy Tasks

Step II: Instructions

Head-worthy Tasks Self-Assessment

1. *Access your work calendar from the past 3-6 months.*

2. *Download our **Head-worthy Tasks Self-Assessment** in Excel (also found in our online **Independent School Organizational Design Resource Center**) or use the table on page 8 to complete this exercise.*

3. *Delete and add any responsibility areas on the self-assessment as needed. Note that the responsibility areas have been compiled from job postings.*

4. *Type your main tasks related to each responsibility area.*

5. *Determine if each task is head-worthy or not according to EAB's criteria.*

We recommend discussing your initial self-assessment findings with your board chair, and then sharing your completed self-assessment with your board and/or senior leadership team so that they can understand how you are determining your head-worthy tasks. Turn to page 13 to learn more about communicating your tasks to your board and leadership team.

Exercise: Recalibrating Head-worthy Tasks

Step II: Instructions

Use this table for completing your tasks. If you prefer to use Excel, click here to download the **Head-worthy Tasks Self-Assessment**, also found in the **Independent School Organizational Design Resource Center**.

Responsibility Area	Related Task	Head-worthy? (yes or no)	Criteria Used (see page 6)
Board Relations & Constituency Relations			
Strategic Planning & Vision Setting			
Curriculum & Instruction, Program Review			
Student Life			
Diversity, Equity, Inclusion, & Belonging			
Enrollment Management			
Fundraising			
Operations			
Policy Development & Maintenance			
Internal & External Communications, Marketing			
Community & Culture Building			
Attracting, Developing, & Retaining Faculty, Staff, Admin			
Financial, Budget Management & Development			
Organizational Management			
Facilities			
Other:			
Other:			

Once you have completed the table, answer the reflection questions found on the following page.

Exercise: Recalibrating Head-worthy Tasks

Step III: Instructions

Review what you have written on page 8, then respond to the questions below.

Reflection Questions

1   How does the number of head-worthy tasks compare to the number of non-head-worthy tasks? In which responsibility areas do you see the most opportunity for redistributing tasks?

2   How have you created (or not created) boundaries around your time and tasks? What has prevented you from creating necessary boundaries?

3   Brainstorm to whom you could begin to delegate non-head-worthy tasks.

In the following section of the toolkit, learn how to most effectively delegate responsibilities and tasks to other members of your team.
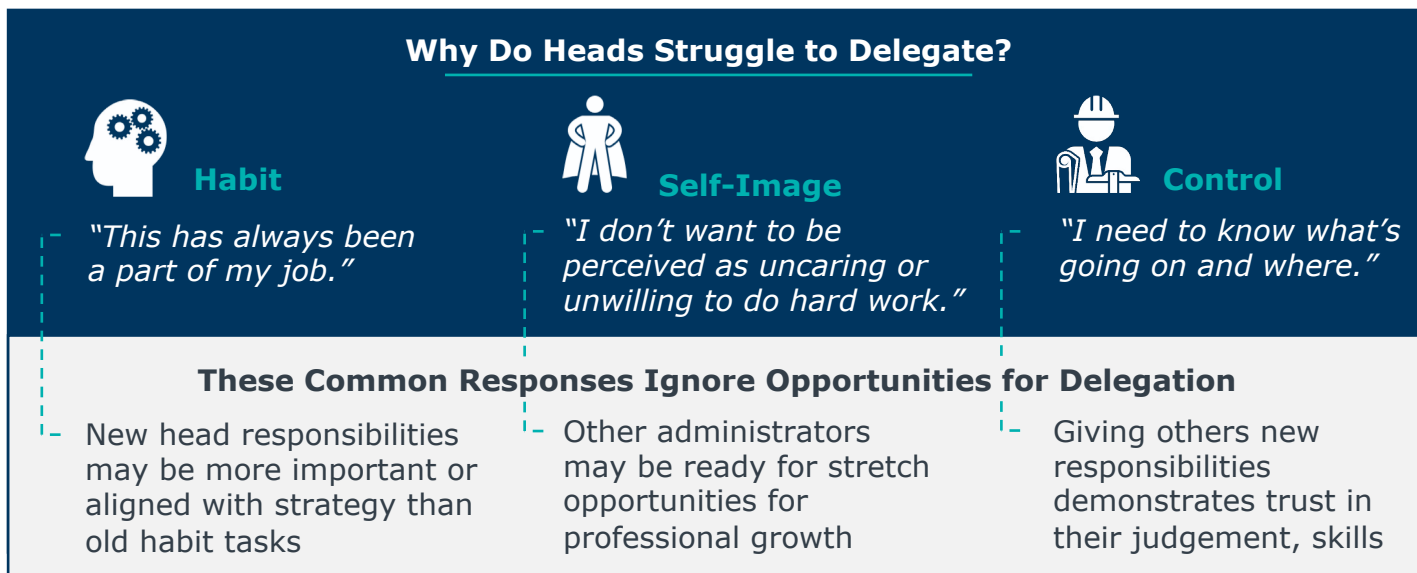
Delegating Tasks

Introduction: Delegating Non-head-worthy Tasks

A 2015 Gallup survey showed that CEOs who effectively delegated authority saw their companies grow faster, generate more revenue, and create more jobs. Yet, delegating is hard, and often not done well. In fact, American businessman Eli Broad stated, "The inability to delegate is one of the biggest problems I see with managers at all levels." Our research interviews revealed several common reasons that heads struggle to delegate.

Why Do Heads Struggle to Delegate?

Habit
- "This has always been a part of my job."

Self-Image
- "I don't want to be perceived as uncaring or unwilling to do hard work."

Control
- "I need to know what's going on and where."

These Common Responses Ignore Opportunities for Delegation

- New head responsibilities may be more important or aligned with strategy than old habit tasks

- Other administrators may be ready for stretch opportunities for professional growth

- Giving others new responsibilities demonstrates trust in their judgement, skills

As is illustrated in the graphic above, heads miss out on opportunities to build trust and skill with their teams when they hold on to tasks that others can (and often should) handle. To help, EAB has put together a list of questions to help you decide if a task could be delegated to someone else based on a variety of important criteria. If you answer "yes" to two or more of the following questions in the list below, then the task should likely be delegated.

Delegation Criteria
1. Is it faster for me to delegate?
2. Is it an opportunity to build trust with leaders?
3. Is it an opportunity to develop administrators' leadership skills?
4. Is it an opportunity to empower leaders?
5. Is there a leader(s) closer to the problem and information than I am?
6. Is it mostly straightforward but time-consuming?
7. Is it something I can easily teach to someone?
8. Is it something in which I do not have the skills/expertise?

On the next page, we've created checklists to ensure that you are utilizing best practices for delegating tasks, including considerations for before you delegate, as you delegate, and after you delegate.

Sources: EAB interviews and analyses; Sam R. Lloyd, "Managers Must Delegate Effectively to Develop Employees," SHRM, 2012. Deborah Grayson Riegel, "8 Ways Leaders Delegate Successfully," Harvard Business Review, August 15, 2019; Sangeeta Bharadwaj Badal and Bryant Ott, "Delegating: A Huge Management Challenge for Entrepreneurs," Gallup Business Journal, April 14, 2015; Jesse Sostrin, "To Be a Great Leader, You Have to Learn How to Delegate Well," Harvard Business Review, October 10, 2017; Sabina Nawaz, "You're Delegating. It's Not Working. Here's Why," Harvard Business Review, November 12, 2020; Jenny Blake, "How to Decide Which Tasks to Delegate," Harvard Business Review, July 26, 2017; Jack Craven, "Great Leaders Perfect the Art of Delegation," Forbes, February 21, 2018. Amy Gallo, "Why Aren't You Delegating?" Harvard Business Review, July 26, 2012.

Delegation Checklists

Before You Delegate

☑ Identify members of your team who would benefit from stretch opportunities or have been looking for greater responsibility

☑ Identify opportunities that will demonstrate your willingness to trust members of your team, particularly those who are less experienced or newer to the school

☑ Be prepared not to criticize different ways leaders may want to accomplish tasks; encourage creativity

☑ Consider that you may be able to get the task done faster than the leader; thus, allot more time than may be expected

☑ Serve or assign someone to act as a coach/mentor for the task, as needed

As You Delegate

Consider sharing the following with the person to whom you are delegating:

☑ Why you have selected that person to delegate to (e.g., skill-building, demonstration of trust)

☑ Areas in which person should consult with you (e.g., major decisions for which greater authority is required)

☑ Expected outcome(s) and timeline

☑ Criteria for measuring success, including KPIs, interim deadlines, etc.

☑ How the task connects to mission, strategy – especially areas that are high-stakes, high-profile, and that stakeholders will be closely monitoring

☑ How often you will meet to discuss progress and the type of project planning and updates that are expected

After You Delegate

☑ Schedule the next time you will meet to discuss progress

☑ Communicate to relevant stakeholders that the task was delegated, and that the person should be seen as the source of authority for the task

☑ Update the person if anything changes about the task (e.g., timelines, outcomes, people involved, etc.)

Sources: EAB interviews and analyses; Sam R. Lloyd, "Managers Must Delegate Effectively to Develop Employees," SHRM, 2012. Deborah Grayson Riegel, "8 Ways Leaders Delegate Successfully," Harvard Business Review, August 15, 2019; Sangeeta Bharadwaj Badal and Bryant Ott, "Delegating: A Huge Management Challenge for Entrepreneurs," Gallup Business Journal, April 14, 2015; Jesse Sostrin, "To Be a Great Leader, You Have to Learn How to Delegate Well," Harvard Business Review, October 10, 2017; Sabina Nawaz, "You're Delegating. It's Not Working. Here's Why," Harvard Business Review, November 12, 2020; Jenny Blake, "How to Decide Which Tasks to Delegate," Harvard Business Review, July 26, 2017; Jack Craven, "Great Leaders Perfect the Art of Delegation," Forbes, February 21, 2018. Amy Gallo, "Why Aren't You Delegating?" Harvard Business Review, July 26, 2012.

Communicating Tasks

Introduction: Communicating Tasks

You may encounter pushback as you delegate non-head-worthy tasks to other leaders at your school, as there may be differences in how individuals perceive what is "head-worthy." In addition, leaders who already have demanding workloads may be concerned about being assigned more tasks.

Therefore, it is important for heads to emphasize the **why** behind these changes to get buy-in from stakeholders. We recommend explaining the following:

1 The growing complexities of the headship, and how the headship has evolved to increase demand for head expertise and responsibility

2 Risks associated with the growing responsibilities of the headship, including:
- Head spending too little time on matters of greatest strategic importance
- Head making risky tradeoffs with time, including time for management/coaching
- Head being asked to be the expert on a matter in which they are not
- Increased head turnover

3 EAB criteria used for determining head-worthy and non-head-worthy tasks, plus any other criteria you are using

4 Importance of taking on new, different tasks for team members (e.g., stretch opportunities, increased trust and confidence)

In addition to communicating what is listed above to stakeholders, we also recommend completing the following steps:

Three Steps to Set Boundaries with Stakeholders

1
Provide transparency on head priorities at a regular cadence
- Publish a summary of annual goals aligned to strategy and mission for stakeholders
- Provide quarterly updates on goals or milestones to stakeholders

2
Break down where head time is invested and protect it
- Highlight where time is being spent on key responsibilities
- Work with Executive Assistant to ensure calendar is protected from tasks that fall outside of scope

3
Continue to delegate tasks as needed to re-focus your time
- Identify new leaders to take on non-head-worthy tasks
- Adjust for the unexpected as needed

Connect with your Dedicated Advisor at EAB for more support on how to communicate these changes to your leadership team and board.

Source: EAB interviews and analysis

ABOUT EAB

At EAB, our mission is to make education smarter and our communities stronger. We work with thousands of institutions to drive transformative change through data-driven insights and best-in-class capabilities. From kindergarten to college to career, EAB partners with leaders and practitioners to accelerate progress and drive results across five major areas: enrollment, student success, institutional strategy, data analytics, and diversity, equity, and inclusion (DEI). We work with each partner differently, tailoring our portfolio of research, technology, and marketing and enrollment solutions to meet the unique needs of every leadership team, as well as the students and employees they serve. Learn more at eab.com.