

You've Signed Your First HOS  
Contract Now What?  
How to make the most of these next  
four months

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**CONGRATULATIONS!**

You are about to start

**THE BEST JOB IN THE  
WORLD**

# GOALS

- Get to know as many people as possible
- Acknowledge your existing strengths
- Reflect on potential challenges
- Identify resources in your present school to help you prepare now for July 1
- Entry Planning

# Pair Share

- Find Someone you don't already know.
- Introduce Yourself.
- Briefly Describe your search process.
- What skills did you develop during the process?
- What did you learn about yourself during the process?

Six Minutes

# Pair Share

- Find Someone you don't already know.
- Introduce Yourself.
- Briefly describe your career path.
- What skills and experiences have you already developed that have prepared you to be a great HOS?

Six Minutes

# Governance

- What is the role of the Board of Trustees?
- What does the BOT do?
- How does the BOT do what it does?
- What is the HOS's relationship to the BOT?
- Why is the HOS/Board Chair relationship so important?
- How and Why are BOT members chosen?

# Governance

## What to do before July 1

- Interview your HOS.
- Interview your present school's Board Chair.
- Ask to be invited to a BOT Meeting.
- Ask to be invited to attend as many BOT Committee Meetings as Possible.

# Fund Raising

- What is the Annual Fund?
- What is an Endowment?
- What is a Capital Campaign?
- What is the HOS's role in fund raising?
- What is the role of the BOT?
- How does the HOS work with the Director of Development?



# Fund Raising

## What to do before July 1

- Interview your HOS.
- Interview your present school's Director of Development/Advancement.
- Interview the Chair of your present school's BOT Development/Advancement Committee.
- Interview a major donor of your present school.
  - Ask why she/he gives.

# Finance

- How do you read a Balance Sheet?
- How do you create a budget?
- Who needs to be involved?
- What is the timeline?
- What does the BOT Finance Committee do?
- What about Financial Aid?
- What is the role of the endowment?
- What about investments/stock market?

# Finance

## What to do before July 1

- Interview your HOS.
- Interview your present school's Director of Finance/CFO.
  - Ask for a tutorial in reading a balance sheet
- Interview the Chair of your BOT Finance Committee.

# Other Elements of HOS Job

- Admissions
- Communications/Marketing
- Crisis Communications
- Facilities
- Diversity/Equity/Inclusion
- Strategic Planning
- Master Planning
- School Law
- Personnel Issues

# Other Elements of HOS Job (continued)

- Student Discipline
- Parent Programming/Relations
- Hiring Processes
- Management
- Educational Trends
- Scheduling/Calendaring
- Accreditation
- Risk Management/Safety
- Emergency Planning

# Pair Share

- Find Someone you don't already know.
- Identify three areas for which you feel well prepared.
- Identify three areas for which you feel you need more preparation.
- How will you use these next four months to prepare?
  - Six Minutes

# Entry Plan

- *Entry: How to Begin a Leadership Position Successfully—The EntryPlan Approach—Education Edition*, by Barry Jentz and Joan Wofford—Leadership and Learning Inc., 2012
- [entrybook.com](http://entrybook.com)
- \$30

# Entry Plan Advantages

- Hit the Ground Learning
- Embrace the Confusion
- Avoid Jump-Reflex Problem Solving
- Inclusive
- Systematic
- Transparent



# Entry Plan Goals

- Get to know your new community
- Let your new community get to know you
- Build Trust
- Model collaboration and shared problem solving
- Set authentic goals
- Create an Action Plan

# Entry Plan Process

- Information Gathering
- Information Processing
- Meaning Making
- Goal Setting
- Action Planning
- Reporting

# Entry Plan

## Information Gathering

- Interview every school employee
- Interview every BOT member
- Interview Parent Leadership
- Interview Alumni Association Leadership
- Survey all parents—new and returning
- Survey all students—new and returning

# Entry Plan

## Possible Interview Questions

- Tell me your story
- Memory that conveys essence of school
- Favorite school tradition
- Major strengths of school
- Areas that need growth
- If you could change one thing
- What else?

# Entry Plan

## Possible New Family/Student Survey Questions

- Tell me about yourself/your family
- What are your special interests?
- Why did you choose the school?
- What are you looking forward to most?
- What else would you like me to know?

# Entry Plan

## Possible Additional Survey Questions for Returning Students/Families

- Memory that conveys essence of school
- Favorite school tradition
- Major strengths of school
- Areas that need growth
- If you could change one thing

# Entry Plan

## What to do before July 1

- Describe Entry Plan to BOT Chair ask for suggestions
- Write draft interview questions and cover letters for each constituency
- Write draft questions and cover letters for parents and students surveys (new and returning)
- Share drafts with BOT Chair for feedback
- Set up meetings with Admin Team July 1-3

# Entry Plan

## What to do July 1-July 7

- Share Interview questions and cover letter with Admin Team for feedback/suggestions.
- Decide upon Scheduling guidelines and restrictions with Admin Assistant.
  - Allow 45 minutes—no more than three a day
- Send interview questions with cover letters to all school employees, BOT members, Parent and Alum Leadership.
  - Include interview scheduling process



# Entry Plan

## What to do July 1-7

- Share parent and student survey questions and cover letter with Admin Team for feedback/suggestions.
- Decide on timing and format of survey—who will be in charge?
  - is it possible to upload a family photo?
- Ask Development Director to identify important school supporters and work with Admin Assistant to schedule meetings.

# New Heads Institute

## July 8-14--Atlanta

- It will be very hot and humid outside
- It will be very cold inside
- Pack comfortable clothing
- Make lots of friends
- Take lots of notes
- Try to sleep at night
- Expect to feel overwhelmed—that's OK

# Entry Plan

## After July 14

- Listen and Learn—Take Careful Notes.
- Identify themes and patterns.
- Identify what is precious and central.
- Identify priorities for change.
- Set Goals.
- Make an Action Plan.
- Late Fall Formal Report to BOT and Employees.

# Books

- All NAIS Books
  - *Head's Handbook, Trendbook, Trustee Handbook, Diversity Work in Independent Schools, Philanthropy at Independent Schools*
- *Good Boss, Bad Boss*, by Robert Sutton (2010)
- *Your Brain at Work*, by David Rock (2009)
- *Real American: A Memoir*, by Julie Lythcott-Haims (2017)

# Pair Share

- Find one more person you don't already know.
- Introduce Yourself.
- Suggest a great book.
- What is your most important take-away from this session?

# THANK YOU

- For participating in this session
- For having the courage to do this work
- For all the transformational work you have already accomplish
- For all the transformational work you will do

*You are never alone*  
*You will be awesome*