



Building Bridges:

Practical Tips for a Successful Head's Transition

Moorestown Friends School
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Head Search Sample Time Line and Overview

A change in the professional leadership of a school can be a time of surprise, uncertainty, sadness, excitement, vulnerability, and opportunity. Recruiting, selecting, retaining, supporting, evaluating, and, if necessary, dismissing the head of school are critical and primary responsibilities of the governing board. The board has only one employee: the head of school.

Many resources are available to help schools navigate the multiple phases of head transition. Your state or regional association and NAIS are both sources of publications on the topic, as well as counseling and guidance. There are many search consultants who support governing boards in this process, and your local independent school association can make recommendations. Some schools choose to make use of professional consultants; other schools may choose to do the work on their own. Whichever the case, it is critical for governing boards to act deliberately and with very careful planning at every step. The process by which the departing head is celebrated, by which the new head is selected, and by which the leadership transition is managed all have a tremendous effect on the on-going success and advancement of the school. No process in the life of the school is more important.

In the ideal, head transitions are planned well in advance. It's always best for the governing board to know at least 12-24 months in advance of a head's plan to move on to a new position or to retire. Of course, circumstances are not always ideal, and personal or professional considerations may be such that the governing board has less notice. Disruptive departures (those that involve friction or loss of trust between the board and the head) are particularly complex. When a head's departure is sudden, it may be wise for the governing board to consider an interim head – a professional head who works at the school for only one year to provide time and space for the school to search for a long-term head. Interim heads can also provide a healthy bridge to new leadership following a long-term, successful headship. Association executives and search consultants can make recommendations about potential interim head candidates.

The sample time-line below was prepared in connection with the retirement of a successful, long-term head at a large, prek-12 day school. The head and the board had a high degree of trust in one another, so the planning began early, and confidential communications were frequent. Depending upon its individual circumstances, a school might need to compress this timetable, or even make use of an interim head in order to have the time for a full search process. Clarity, respect, confidentiality, careful planning, and appropriate communication are critical at every phase of the process. Your local independent school association stands ready to act as a helpful resource.

Projected retirement date of current head: June 30, 2018
All deliberations are strictly confidential within the Board until noted.

September, 2015: Head of School shares confidentially with Board Chair his/her intention to retire in June of 2018. Board Chair supports Head of School, and vice versa.

October, 2015: Board Chair shares confidentially with Board the Head's intention to retire in June of 2018. Allows Board to share reflections. Describes projected search process.

January, 2016: Board chair forms "Transition Planning Committee." TPC works for three months, confidentially talking with several consultants, new heads of school, and chairs of search committees that have completed their work to gather insights and to develop a time-line for the search. TPC meets monthly, in person or by conference call.

April, 2016: TPC seeks approval from Board for the proposed timeline below.

May, 2016: Head Search Committee (HSC) is formed by Board Chair. Eight members (six current or past trustees and two faculty members). The trustees include two current parents, two alumni, and two people of color. Members include four men and four women.

June, 2016: Celebrate graduation and end of year.

June, July 2016: HSC drafts RFP and sends to five search consulting firms; begins drafting a long-range, strategic communications plan for the transition. Consults with Director of Development and outside fund-raising counsel.

September, 2016: HSC interviews three search consulting firms.

November, 2016: HSC recommends consulting firm to full Board for approval.

November, 2016: Communications about Head's retirement sent to school constituencies, includes roster of HSC members and name of search consulting firm. Position is posted on Blue Sheet, AIMS, NAIS, and other websites.

****Retirement plans of current head and search are now public.****

January 26, 27, 28, 2017: Search consultant comes to campus for "discovery" in preparation for writing the opportunity statement/school profile.

February 2017: Consultant drafts opportunity statement/school profile; HSC approves. Disseminates profile widely and begins compiling resumes.

March 2017: Consultant has preliminary interviews with candidates at NAIS Annual Conference in Baltimore; continues developing candidate pool and conducting preliminary interviews.

April, May 2017: Consultant continues to develop candidate pool. School continues to develop communications timetable and plan. HSC forms advisory groups (confidentially).

June 2017: Focus on seniors and graduation. Consultants continue to develop roster of candidates.

July, 2017: Transition planning continues. Consultants continue to develop roster of candidates.

August, 2017: Consultants present long list of candidates (12-18) to HSC in a day-long, off-site meeting. Candidate list is narrowed to 8-10 “semi-finalists.”

September, 2017: Search Committee meets with semi-finalists off-site for 1 ½ hour interviews over a period of two days over a weekend. Search consultant is present for this meeting.

October, 2017: Finalists (2-4) invited to two-day interviews on campus with full involvement of advisory groups, tour of Head’s residence, meeting with full Board, etc.

November, 2017: Reference checks, collation of information from advisory groups, HSC makes recommendation, seeks unanimous approval from full Board. Contract is negotiated and announcements are made.

January 2018: Board chair forms “Transition Team.” New head focuses on his/her current job for remainder of 2017-18 school year; has periodic contact with new school. Retiring Head and incoming Head make some critical decisions jointly. Executive coach for new head is engaged.

May 2018: Transition Team active; celebrate retiring head vigorously.

June 2018: Transition Team active; celebrate seniors and graduation.

July, 2018: New Head takes office. Begin celebrating new Head. Provide multiple opportunities to introduce new Head to all school constituencies. Transition team continues to be active through the coming year. The transition evolves over the coming months, with different opportunities and needs for support, guidance, affirmation, and care.

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Community Exit and Entry Plan

Moorestown Friends School



The following is a timeline of major events, communications and engagements with the school community through the transition process.

October/November – New Head of School Announcement

- Eblast with letter from board chair and letter from incoming head of school to former trustees, faculty and staff, all parents, alumni, grandparents, alumni parents, former faculty and staff etc.
- This is an opportunity to notify key members of the community of the news with a personal communication.
- Direct mail piece with same letter from board chair and letter from incoming Head of School to all school constituents.

January – Eblast from board chair to all school constituencies inviting them to share 3 words describing the retiring head. To be used in upcoming publication.

February – Retiring head and new head attend NAIS conference with a few members of administrative team.

March – Eblast from board chair announcing naming of building by the board in honor of long-serving, retiring head of school.

March – Alumni and friends receptions for retiring head of school in Boston, New York and Washington.

April – Public phase launches to the school community of endowment fundraising campaign in honor of retiring head of school.

April – School magazine lands cover picture and feature story on retiring head of school.

April - Incoming head visits for 2 days – Meetings with faculty, staff, students, and the Alumni Association. Reception for meeting with parents as well as faculty and staff. Dinner and reception hosted by a trustee for current and former trustees with both the retiring head of school and new head of school, with remarks shared by the board chair, as well as retiring head and new head.

May - Events honoring the retiring head of school during Alumni Weekend including remarks at the Alumni Banquet, and Alumni Reception. Later in May, on a Sunday afternoon, a Meeting for Worship and reception for the retiring head is held for all community members.

Late May – Eblast from retiring head sharing reflections, accomplishments and gratitude.

Late May – Final board meeting with retiring head, dinner follows with trustees.

June – Commencement

June – Dinner-In-Gratitude, final community event for head of school with lead volunteers. Remarks shared by board chair.

Mid-June – Final event with retiring head planned with administrative committee.

Late June - New head and family move into head's residence; welcomed with food and flowers by board chair and other trustees.

First day in July - Reception with faculty and staff on first day for new head. New head sends several emails to trustees and key supporters on first day.

Summer - New head outreach to trustees, arranging for 30-minute meetings or phone calls to get to know the new trustees.

Summer – New head invites all faculty and staff to meet individually for 30 minutes. This project continues through the next year.

Summer - Meetings with current and former trustees.

Summer – Lunch with local heads of school.

Summer - Retreat with administrative team.

Late July/Early August – Eblast from new head to all school constituencies.

August – Head hosts pool party for faculty, staff and their families. Head hosts a thank you event for maintenance and housekeeping staff who helped prepare the head's residence.

August – New head attends receptions for parents new to the school

September – Day before school opens, head attends all school picnic (faculty, staff, students, parents)

Mid-September – Sunday afternoon Meeting for Worship to welcome new head. All school constituencies invited.

Late September - All School Convocation ceremony (students, faculty and staff, current and former trustees and area heads of school) followed by luncheon and start of first two-day board meeting.

Fall – Ongoing visits with key prospects, former and current trustees.

October – Establishes first of quarterly meetings with local school superintendent

October – “Head’s Perspective” newsletter communication written and photos by new head shared with school community.

October – School magazine lands with photo of new head on cover and feature story

October - Three divisional dinners and Quizzo night for new head with students and parents.

November – Head welcomes Alumni Association members to campus for photo journey.

November - Philadelphia area alumni reception for new head.

November - Reception for new head at local retirement community with alumni, former faculty and alumni parents.

December – Two-day meeting with head and current and former Head’s Council members.

January - Ongoing visits for new head with key prospects, former and current trustees.

February – Alumni receptions in Seattle and Los Angeles for new head.

March – New head attends Parent Council auction fundraiser.

April - Alumni receptions in New York, Boston, and Washington for new head.

May - Alumni Weekend

June – College-age alumni event with new head at local restaurant.

Topics for Discussion - The Head's Transition

Created by Larry Van Meter and Julia de la Torre
Moorestown Friends School



Board of Trustees:

- Relationship with the Board Chair
- Future leadership of the Board - succession, governance
- Background and insights on each Board member

Personnel:

- Insights on the Administrative Team
- Working with the Associate Head of School - roles, responsibilities, chemistry
- Key people to prioritize getting to know in the first weeks
- Areas of concern that are worth understanding out of the gate
- Hiring process and areas of opportunity in the near future
- Efforts to increase faculty/staff diversity
- Current mood/tone among faculty (morale)
- Being wary of the first ten people to seek you out

Development:

- Opportunities and challenges of development in our market
- Major donors; key relationships that are held by outgoing HOS; opportunities for joint meetings with new HOS
- Status of any fundraising campaign, Annual Fund, endowment
- Key families who are still in the school
- Key alumni to get to know
- Prospective donors to keep in mind in the first weeks and months; who should get personal outreach

Admissions and Enrollment:

- Market analysis or understanding of sending communities
- Retention - who is involved and what the trends have been
- Admissions process and the role (if any) of the HOS
- Getting to know the local market
- Staffing model for admissions and enrollment management; is it working?

Program:

- Signature programs the new HOS should know about
- Any programs that are failing or might need attention

School Culture:

- Political landmines to be aware of
- Faculty dynamics
- Relationship between teachers and staff
- Decision-making processes in the school
- Traditions and “sacred cows”

Relationships Outside of School:

- Peer schools in the area--understanding our value; meeting area heads of school
- Regional school associations or other peer networks
- Recommendations on outward-facing relationships that need attention
- Ways to become known in the community
- Consultants or vendors who work with the school

Strategic Planning:

- Most recent strategic plan and the process involved
- Progress to date on strategic priorities; what needs more attention?
- Expectations for future strategic planning

Finance and HR:

- The budget cycle and any idiosyncrasies to know about
- Loans, debt, and properties (if applicable)
- Benefits, onboarding of new staff, and personnel management
- Annual reviews

Miscellaneous:

- Emergency response practices and culture around safety and security
- Culture around communications; when and how often do people hear from the HOS?
- List of consultants and the type of work they have done, including perceived value, outcomes, and cost
- Ways in which students engage with the HOS

Ongoing Projects: Discuss any projects or initiatives that will not be complete in time for the HOS transition; what are the expectations for the new head?



Head Winds & Tail Winds Exercise

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***Practical Exercise:** Imagine that your school is approaching a Head of School transition in the near future. Make a list of all of the factors that would support a smooth transition and the factors that may get in the way.*

Tail Winds: <i>What might help ensure a smooth head transition?</i>	Head Winds: <i>What might get in the way of a smooth head transition?</i>