

What Every Trustee Should Know About Head Transitions



Step 1: Reflect on Board's Responsibility in Head Departure

- Some departures not influenced by Board
- Boards share some responsibility for most
- Common reasons for dissatisfaction
 - Feeling a lack of control
 - Rewards are insufficient
 - Interpersonal conflict

Step 2: Commit to Clear and Frequent Communication

- Change is uncomfortable
 - Parents worry about the kids & their investment
 - Faculty worry about their careers
- Communicate the process
 - Understanding leads to comfort
 - Comfort leads to confidence that the process is under control

Step 3: Assess Needs

- Make sure strategic priorities are clear
- Understand your school's mission, culture and core values
- Understand essential personal attributes
- Understand skills that can be acquired
- Be careful what you wish for
- Understand special challenges in replacing a long term head

Step 4: Appoint a Search Committee Chair

- Consider personal attributes to complement desired Head attributes
- Consider next Board Chair
- Give Search Chair latitude to build the process and the committee

Step 5: Understand Search Costs

- Search Consultant fee
- Travel expenses
- Venue and food for semifinalist interviews
- Catering for events during finalist visits
- New Head moving expenses
- Possible incremental salary costs
- Possible incremental benefits costs
- Legal fees for employment contract
- Lost momentum in achieving strategic plan goals

Step 6: Consider Investing in a Search Consultant

- Saves major time and effort
- Legitimizes process with school community and candidates
- What to expect from a consultant
 - A proven process
 - Site visits; professional position statement
 - Active advertising and national recruiting
 - Preliminary screening and reference checks
 - Administrative support
 - Professional interface with candidates

Step 7: Find a Search Consultant

- Look for listed firms on the NAIS website
- Do a search for the search consultant
 - Request proposals and compare them
 - Understand their process and fit with your school culture
 - Interview a group of finalists
 - Check references thoroughly
 - Any guaranty if search unsuccessful?
 - Is this the individual you want representing your school to potential candidates?

Step 8: Understand the Search Calendar

- Optimal timing
 - Hire consultant in early spring
 - Complete position statement and post by June 1
 - Schedule semi-finalist interviews early October
 - Schedule finalists school visits in late October
 - Make offer in November for July 1 appointment
- Risk of poor timing: best candidates already have offers or appointments
- If you are too late, consider appointing an Interim Head

Step 9: Plan the Semifinalist Interviews

- Avoid temptation to choose more than 8
- Meet off campus to maintain confidentiality
- Send school background data to candidates
- On the day of the interviews
 - All committee members should be present
 - Ask a consistent set of questions
 - Spend the same time with each candidate
- Make friends not enemies

Step 10: Plan the Finalist Visits

- Structure sessions to give feedback on actual Head duties
- Include Board, parent & faculty forums
- Introduce candidates to greater community
- Invite family and provide separate program
- Seek constituency feedback

Step 11: Perform Thorough Reference Checks

- Consider provided references the starting point
- Thoroughly understand candidates and their match with the school
 - Their experience, skills, and potential
 - Their motivation
 - Their management style
 - Their family circumstances
 - Their values
- Listen carefully

Step 12: Make an Offer to Your Top Candidate

- Research competitive salaries
- Understand individual needs to design benefits package
- Expect to engage legal counsel to draw up employment contract
- Do not settle for a second choice

Step 13: Develop a Transition Plan

- Celebrate the outgoing Head
- Plan to welcome and assimilate the new Head and family into the community
- Set first year goals to maximize Head's fresh perspective
- Do not force an early decision to a controversial problem
- Articulate to the community expectation that new Head will have a new style
- Board should be visible and active in supporting decisions of the new Head



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