

ADVANCED PLACEMENT

Evaluating the Head of School Transition



by Marc Levinson



Marc Levinson is currently serving as Executive Director of MISBO. MISBO is an association serving over 320 independent schools in 14 states (and Washington, DC) primarily in the Southeast, with a robust purchasing consortium as well as professional development and resources serving the business operations of these schools. During the past eight years Marc has presented at well over 100 State, Regional, National and International Independent School conferences. Prior to accepting his position at MISBO, Marc spent four years as a Director with the National Business Officers Association (NBOA), where he managed the live and web-based programs. Prior to joining NBOA, Marc spent six years as the Business Manager at Alexander Dawson School (ADS) in Lafayette, Colorado. Before entering the Independent School world Marc spent three years as Director of Operations and Finance at Sounds True, a Spoken Word Audio Publishing company and three years in a similar position at Community Food Share, Boulder County's Food Bank. Much of his career has been in the food service industry, owning and operating a number of very successful restaurants in Boulder and Denver, as well as providing executive direction for a natural foods grocery store. Marc recently served as the Chair of the Finance Committee of the Board of Trustees of Watershed School. He holds a bachelor's degree in Political Science and an MBA (Organizational Development) from the University of Colorado at Boulder.



@marcll

#MISBOAP



HISTORY

MISBO was originally founded as Business Officers (of) Atlanta Area Independent Schools (BOAAIS) in 1976 by Ken White, Business Manager of The Westminster Schools, and the business officers of five other Atlanta area independent schools for the purpose of encouraging excellence and creative leadership in the independent schools.

As the association moved forward, it developed a purchasing consortium and helped develop policy for a liability insurance program, while continuing to promote best practices and professional development. In June of 1998, the association was renamed Mid-South Independent School Business Officers, or MISBO.

Today MISBO has over 300 member schools, mainly from the Southeastern region of the United States. The association continues to support the business officer in the independent school and now includes all business operations. The purchasing consortium has grown to over 100 contracts for commonly used goods and services negotiated by leveraging the collective buying power of our membership.

MISSION

MISBO is a professional association of independent schools in the Southeast Region of the United States that provides opportunities for collective purchasing, information sharing and professional development for the business officers and the business operations of independent schools.

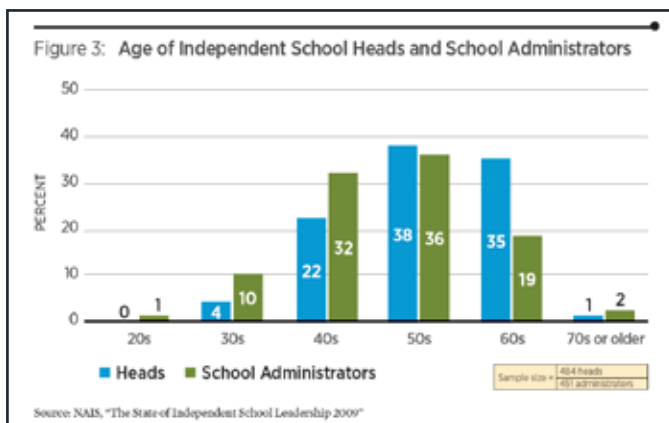
SERVING THE BUSINESS OPERATIONS OF INDEPENDENT SCHOOLS

The Keys to the Kingdom

Over the past 13 years working with independent schools, I have watched many head of school transitions. Some have been very successful, some have been dismal failures, and none of them has been easy. Witnessing these transitions, I've wondered: **is the model broken?**

In my experience, the typical model for head transitions involves an expensive search firm, a search committee that doesn't always understand its marching orders, and a long, long walk to the finish line. The transitions feel instinctively inefficient and therefore at odds with the rapid-fire pace of educational evolution.

It is critical that we examine and improve our head leadership transitions now, because independent schools are poised to face a major head shortage by 2020. According to data presented in the 2014-2015 NAIS TrendBook, "Nearly two-thirds of independent school heads are likely to retire within the next five years, yet few administrators are interested in pursuing the headship."



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Furthermore, the future leaders of our schools are Millennials, who are much less likely to look at 20-year career positions. This means our schools will be conducting more searches more frequently. Can we afford the money spent and the time lost? I'd argue that the answer is "no."

In order to find out more, I interviewed 27 people at numerous schools and consulting firms about head transitions. Their insights convinced me that this is a key sustainability issue for independent schools today. If we don't move it to the front burner, our schools will inevitably suffer.



ISSUES WITH THE CURRENT HEAD TRANSITION MODEL

It's time-consuming.

The head search and transition process is a multi-year event (see following Insert). This is partly driven by the board's desire for conscientiousness in leading the school through a major change and partly by state and regional requirements around strategic planning. Most of our schools continue to have accreditation standards that require strategic planning on a five-year cycle. Heads will typically attempt to time their departures in order to minimize disruption to the school or its processes. This is a noble goal, but the outcome is typically a situation where no major changes are happening at the school for a two to four year period of time, which is, ironically, extremely destructive to a school. In a world that operates at the speed of Twitter, two years feels like 20 and a school can easily lose its relevancy in that period of time.

HEAD TRANSITION TIMELINE

YEAR 1:

JANUARY (OR EARLIER)

Head discusses his/her departure with the board.
Board selects a search committee chair.
Search committee is formed.

FEBRUARY – MARCH

Search committee creates a request for proposal for a search firm (very few schools do this without assistance).
Search committee reviews proposals from 4-7 firms.
Search consultant is hired.

MARCH – APRIL

Search consultant conducts research, meets with school people, and helps school craft the position paper, etc. – this time is very important for the search firm to get to know the culture of the school.
Search firm begins to identify potential candidates.

MAY – JUNE

Search firm continues to identify candidates and begins the initial interview process.
Search committee begins to review candidates (on paper).
Search firm and committee meet to review candidates.

JUNE – JULY

Search committee chair or others may visit/interview candidates.

JULY – AUGUST

Candidate pool is narrowed to a group of 'semi-finalists' – this is typically around 10 candidates.

AUGUST – SEPTEMBER

Candidates are interviewed by search committee. Typically this will be for a very short period of time – perhaps as short as 1-2 hours and typically at a location near the school, but not at the school. At this time, the process is still very confidential.

SEPTEMBER – OCTOBER

Search committee will narrow the field to 2-4 finalists. These candidates are typically invited to visit the school for a multi-day interview process, which

has been described to me by heads that had been through the process as "grueling."

This now becomes a transparent process in most cases. The candidates need to inform their current schools (or employers). This is the time for the candidates to 'sell' themselves to the school and vice-versa.

These interviews will typically occur as close together as possible. The search committee will ideally meet immediately after the last interview is complete to make a decision.

OCTOBER – NOVEMBER

References are checked to a limited degree for all finalists and then to a higher degree for the candidate that is offered the position. This work should be accomplished by the search committee and NOT by the consultants.

Contract negotiation begins – typically this will be between the search committee chair and the candidate. Again, the consultants should not be directly involved in this process.

Contract is signed and announcements are made at both schools.

NOVEMBER – DECEMBER

It is important to note that the school where the new head is coming from must now deal with its own process. If the person is a current head, then it is obvious that the time line is very different. Search firms have told me that there are still plenty of good people to hire at this point, but the process is accelerated.

In many cases the school will decide to hire an interim and then the calendar is on track as indicated here.

YEAR 2:

JANUARY – JUNE

This can be a difficult time for all involved. The outgoing head is in an unusual position requiring budget and staffing decisions that will impact his/her successor. In some cases the new head will be consulted, but this is not a normal occurrence.

The other school is going through the same process and set of decisions. Most hiring decisions are made in February – March of each year.

It's expensive.

Search consultants charge either a flat fee or a percentage fee. A search consultant's percentage fee typically amounts to 30% of a new head's first year salary. As heads' salaries have increased over the past 10 years, this percentage fee has become a significant investment for schools.

According to National Association of Independent Schools (NAIS) / Data Analysis for School Leadership (DASL), mean head salaries have increased from \$184,000 to \$260,000 from 2005-06 to 2013-14—or 41%. (These numbers reflect cash salaries — without benefits, deferred compensation, etc.) This means that the base cost for a search consultant is nearly \$80,000. After interviewing people at several schools, it was clear to me that a school needs to budget upwards of \$150,000 to cover all expenses, which may be manageable for a larger school but is prohibitive for a small school.

Several search firms with whom I spoke are now charging a flat fee; at least two are charging a fee based upon the school's size and resources. These base flat fees were closer to \$35,000-\$40,000, which, all in, would look more like a \$75,000 investment.

If a school is only going through this search process every 15-20 years or more, the investment can be managed appropriately. What happens when we start seeing heads turn over after 10 or even five years? And how about when a search is not successful (no new head was hired or a head stayed less than three years)? The cost of this kind of failure could be staggering.

Search committees aren't experienced.

Trustees lead search committees. In recent years, independent schools have tackled their governance issues and have instituted stricter term limits for trustees. The average board chair may now only be in place for two to four years and board members typically have a three-year first and second

term (six years total). While the governance improvements are laudable, the unintended consequence for head searches is that the same board will not go through two head transitions, so it can't learn from its mistakes. During my interviews for this project, several heads said, "The board that hires me will not be the board that fires me."

While a search committee chair is almost always an experienced and respected member of the board, this person has rarely been trained to lead a search and there are very few resources to help him or her. The source most commonly cited is *The NAIS Head Search Handbook: A Start-to-Finish Guide for the Search Committee*, which was published by NAIS in 2006. The book is a compilation of chapters written by a number of search consultants and the information in it is, at best, nearly 10 years old. I believe it is time for our associations to take a careful look at this issue and develop a plan to provide resources and training for search committees.

Pat Bassett, former President of NAIS, and John Chubb, current President of NAIS, along with several other association leaders I spoke with, expressed concern about the lack of resources and training for search committees. Most agree that hiring (as well as supporting and evaluating) leadership is the primary responsibility of our school boards, but most are ill-equipped to tackle this assignment.

Search firms have limited candidate pools.

There are a number of well-established and well-known search firms that serve independent schools. In fact, many of these firms serve only independent schools and focus on head searches, the largest of which has approximately 30 consultants working on head searches.

The traditional firms are very focused on their databases of people within the independent school world that they have connected with over the years.

In many cases, the search consultants are former heads themselves. This is not necessarily inappropriate, but it does limit the candidate pool to only “independent school people” and, in many cases, current (or past) heads at other schools. This suggests to me that the “search” is less of a “search” and more of a “placement.”



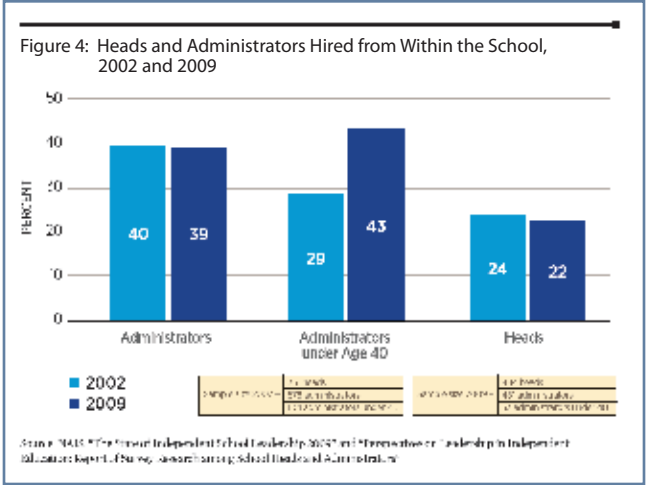
WHAT COULD WE DO
DIFFERENTLY?

Schools will no doubt have to make hiring decisions that work best for their communities. Here are a few suggestions that, overall, should help schools and the independent school community as a whole.

Hire internally.

In 2013 and 2014, approximately 80% of the new CEOs at the top S&P 500 firms were hired internally. These people were carefully groomed and selected to lead their organizations. It is essentially the opposite at independent schools, where somewhere in the neighborhood of 85% of heads are hired externally (see Sidebar).

It is unclear why our industry has moved so far in this direction. It certainly benefits the search firms that serve our schools, but I am not convinced that it serves our schools well. As the number of retiring heads increases over the next five years, boards may need to change their principle of hiring an experienced head. Also, given the transformation in education that is happening, it may be that the “experienced” heads are not able to bring the



skills, innovation, and creativity to the job that they have in the past.

Independent schools can also do a better job of vetting internal candidates. Rather than putting them through the same process as external candidates — which is not fair to the internal or the external candidates — they should be separated. As Pat Bassett, former President of NAIS said, “The best candidates may not be available because of fear that they may lose their current position if they are known to be looking. This is true for senior administrators as well.”

Steve Robinson, President, SAIS suggests in *Growing Administrative Talent: A Case for an Increase in Internal Successions to Head of School*, October 2012: “Prior to undertaking a national search, the board should first conduct a thorough review of any internal candidate and make a decision of whether or not the candidate will be offered the position.” If the board determines that no internal candidates are appropriate given the current situation at the school, move on to an external search.

INTERNAL HIRES

The vast majority of independent school heads are hired from other institutions. The following data from a select number of states and associations validates this point.

Data for specific states/regions:

FL - 102 head transitions out of about 160 schools in the past five years (some schools twice) – 19 were internal hires, or 18.6%

GA – 122 head transitions out of 158 schools in the past five years – 8 were internal hires, or only 6.5%

TN – 27 head transitions out of 59 schools in the past five years – 100% external hires

NC – 74 head transitions out of about 90 schools in the past five years – 7 were internal hires – there are several situations in NC with interims and several schools with multiple transitions in this period of time

NWAIS – 60 new heads out of about 115 schools in the past five years – no data on internal vs. external

CT – 45 head transitions out of about 100 schools – 18 were internal – all 18 are still in place; not so for the others

Have better succession planning.

I have spoken with a large number of heads of independent schools and only once did a head tell me that his board specifically tasked him with developing the next generation of school leaders within his school. This board has taken a page from Spencer Stuart (consulting firm - www.spencerstuart.com) author of “CEO Succession Planning: The CEO’s Critical Role,” who says, “When should succession planning begin? While somewhat counterintuitive, ideally, the process should start early in a CEO’s tenure, possibly when the CEO starts in the role.”

Even in our smallest schools, I believe that the head should be responsible for leadership development. As an industry, it seems we have just defaulted to looking outside our schools to fill any and all leadership positions. In his 2013 article, “Head Transition and Succession Planning,” SAIS President Steve Robinson puts it well: “Ironically, even though schools are in the general business of talent development, most boards engaged in head searches seek talent that has been developed elsewhere. They choose external candidates despite risking the loss of programmatic continuity, cultural stability, and institutional memory.”

The independent school industry as a whole can do a better job of developing leadership talent. Independent school associations, typically the keepers of professional development resources, have not developed what feels like a consistent approach to cultivating leaders. While NAIS provides a yearlong program for aspiring heads of school, the process for joining it is not a selective one. Recently, John Chubb, President of NAIS, convened a steering committee comprised of association leaders to help NAIS develop more robust leadership identification, development, and training programs. I believe that board trustees must be included in this at some level. Ultimately, it is our school boards that will need to be responsible for changing the existing leadership transition model and providing the leadership to develop talent from within our schools.

Rethink the head of school model.

The traditional career path to becoming a head of an independent school is through academics. Most heads begin their career as a teacher. But is teaching experience the skill that is most important to being a successful head of an independent school? Given the fact that these people are CEOs of multi-million dollar institutions with oversight and responsibility for the financial sustainability, significant fundraising (external pressures), facility management, etc., perhaps it is time to reconsider the skill set of heads and look beyond the independent school classroom to the talent pools of public schools, higher education, and for-profit and nonprofit organizations.

Another possibility for a new head leadership model comes from higher education, where there is often a president (more of a CEO) and a chancellor (more of an academic director). Certain (larger) independent schools in the K-12 space are embracing this model. For example, Jackson Academy in Jackson, MS has an administrative structure that includes a president (this year, the former CFO) and a headmaster (the academic leader of the school).

Sync up board chair transition with head transition.

During my interviews, one fact became clear to me: when there was a thoughtful discussion about board leadership with the candidates and then the incoming head at a school, and when the search committee chair was committed to board leadership (most often by becoming the new chair at the same time as the new head), the school enjoyed great success. The evidence suggests that the commitment to a thoughtful board leadership transition is a significant factor to a new head's success.

Philips Academy Andover

Andover, MA

In its 237th year • co-ed • boarding-day • 1138 students • grades 9-12

John Palfrey is in his third year as head of school and by all accounts has established himself as a dynamic and respected leader in this community. Andover is one of the oldest schools in the US – in its 237th year, the school is steeped in tradition with over 25,000 alumni. Mr. Palfrey was a tenured professor at Harvard University, having reached that status in his 30s – an amazing accomplishment.

Peter Currie, chair of the search committee, told me the story of a moment when he was on an airplane watching a young girl (about 9 years old) spend the majority of the long plane ride using her iPad, and he wondered if Andover would be ready for her in 5 years or so. His concern for Andover was whether their school would continue to be relevant to a new generation of learners. This helped him frame the search for a new head of school. Hiring a nontraditional search firm (which asked not to be named) was a significant step for Andover. I would argue that if not for this choice of search firms, Andover would never have had the opportunity to consider Mr. Palfrey as a head of school. He would not have been on the radar nor did he have any connection to the more traditional firms working for independent schools. Additionally, the willingness of Mr. Currie, the search committee, and ultimately the community and board of Andover to make this decision was in many respects very risky. Mr. Palfrey came to Andover with a great many skills and some understanding of independent school education from his experiences as a student at Exeter, but he was an author and a college (Harvard) professor. Taking over leadership of an institution like Andover required using his skills in a different way. It was exactly the search committee's commitment to finding a new leader with the appropriate skills that was instrumental in the decision to offer this position to Mr. Palfrey. These skills included well-honed governance and financial management experience – two factors that often lead to failures

with independent school heads and two skills that are not well developed in many new heads.

In some respects the search process was very traditional, following a typical timeline and transparency. The community was very involved. The two finalists went through the typical two-day grueling interview process. The search committee initially considered internal candidates, but no internal candidates entered the process. When the external search began, it was clearly communicated that there were no internal candidates.

I believe that one factor that has led to the success at Andover (and others) is the decision early on in the process that the selection of Mr. Currie as the search committee chair was a step to chairing the board when Mr. Palfrey became head. This decision was communicated to the candidates and there was no question about board leadership for the new head.

I asked Mr. Palfrey about succession planning. He believes in and has instituted programs at Andover promoting leadership development within the school. I also asked how long he thought was the appropriate tenure for a leader. His answer was predicated on the ability of the institution to change and the time and effort that this would take as well as the challenges faced in changing the culture. He believes that anything less than five years would be too short and that much longer than 10 years is likely to be too long. At that point he would expect it to be difficult (but not impossible) to continue to move the institution forward at the same pace. To Mr. Palfrey, 10 years seemed like the right amount of time – enough time to accomplish real changes and meet his goals, but not too long that he would burn out or fail to perform at the highest level.

Saint Andrew's School

Boca Raton, FL

In its 52nd year • co-ed • day-boarding • 1275 students • grades JK-12

Of the four schools profiled, Saint Andrew's followed a more traditional search path and process. The departing head led the school for six years and had been hired internally. She had served 10 years prior to that as the school's Upper School Director.

The board chair at the time asked board trustee Mary Jo Finocchiaro to serve as the search committee chair. Ms. Finocchiaro was in the first three-year term of her trusteeship but had assumed increasing levels of responsibility in her committee work and was on a clear path to board leadership. Board leadership transition is clearly a significant factor in continuity and success for the incoming head of school. She immediately read *The NAIS Head Search Handbook* and used this information, along with her extensive business experience, to lead the process. As with Andover, they followed a typical timeline and process.

The search committee interviewed four search firms. The committee was delighted with the qualifications of each firm, but Carney Sandoe (CS) and the two consultants assigned to the engagement presented the ideal fit, according to Ms. Finocchiaro. Among other things, she connected with the consultants personally and was moved that CS was responsible for the recruitment and placement of more people into independent school leadership and teaching positions than any other such firm in the country. They had also been doing it for 35 consecutive years, longer than any other single firm.

The search committee, in this case, was relatively small and comprised of only board trustees. The process was very inclusive and transparent, but they decided that hiring the new head was a board decision and therefore the committee would consist only of trustees. As with Andover, only two finalists were invited to the Saint Andrew's School campus for the final two-day interview process and the search committee and board had consensus on the appointment. These are important factors. New heads need to be assured they have the support

of the full Board; consensus in the hiring decision appears to be a significant factor in foreshadowing successful transitions. Having relationship continuity – meaning that the search chair responsible for leading the effort to hire the head later becomes the board chair – is also an important factor.

From the onset of the search for a permanent head, the Saint Andrew's search committee was open-minded and considered internal candidates, rising stars, and sitting heads to lead Saint Andrew's School. Ms. Finocchiaro described the candidates sourced by Carney Sandoe as exceptional, but as the search developed and the candidate pool narrowed through the various selection rounds, a very specific candidate profile emerged to steward the school's mission and lead Saint Andrew's School.

Peter Benedict II was appointed as the new head. Mr. Benedict has followed a very traditional path to independent school leadership, starting as an English teacher and moving through a series of administrative positions including one prior headship. Mr. Benedict was a great cultural fit as he was raised in Florida and his father was a long tenured head of a Florida independent school. CS approached him early in the process – they knew him well as CS had been the firm that placed him in his prior position and had contacted him about other opportunities. Mr. Benedict believes the relationship between the candidate, search chair, and board chair was a critical element to the success of the process and that the transition has been smooth. He encouraged any head candidates to look carefully at the school governance and leadership before making a decision.

He did comment that the process seems much too long and is exhausting for the candidates, especially if they are in multiple searches, which is common; this has a serious detrimental impact on their current schools. He would like to see this process streamlined. I asked Mr. Benedict about head tenure – he spent seven years in his prior headship. He agreed that anything less than five would not feel like a success for anyone and that the magic number may be as long as 15 years, but certainly not the 27 years his father had spent as head of one school. Today's environment is not conducive to that long of a tenure.

CASE STUDY — THREE

The Madeira School

McLean, VA

In its 108th year ~ girls • boarding-day • 306 students • grades 9-12

Pilar Cabeza de Vaca is in her fifth year as head at Madeira, so the longest of the four case studies and clearly long enough to declare her appointment a success. The search committee was co-chaired by Sarah Daignault, a long term board member and alum of the school, along with Jen Shakeshaft, also an alum and board member. Ms. Shakeshaft was class of '91 as opposed to Ms. Daignault who was class of '66. This co-chair arrangement provided a significant generational balance for the committee leadership. At the time, Ms. Daignault also served as Executive Director of NBOA and served on the NAIS board. She clearly brought a great deal of independent school knowledge and expertise to the situation.

As with the prior two schools, the timeline and process were fairly typical. The search committee interviewed six firms, four that would be classified as traditional independent school head search firms and two nontraditional. One of the nontraditional firms was selected. Since I was unable to interview anyone from the search firm, I will not identify them. One of the compelling factors in the decision was that the team from the successful firm consisted of four women with ethnic and age diversity.

As with Andover, this nontraditional search firm was not as constrained by the typical independent school candidates. Ms. Cabeza de Vaca had significant experience as a head of two international schools and at the time of the search was the Executive Director of ECIS, an association serving the international schools in Europe. It is unlikely that she would have been in the candidate pool of a traditional search firm. This provides another example of a nontraditional firm bringing greater depth and variety to the candidate pool for a school. All of the committee chairs, heads, and search consultants discussed the critical importance of fit for the school and the candidate. One described the process as a courtship; both parties need to get to know each other before a decision is made.

In this case, the search chair did not move into the board leadership role – she had already served as board chair for many years and the transition was planned and known to the candidate. Even though that factor was not present, a clearly articulated board leadership transition is again an important factor in the success of the head transition.

CASE STUDY — FOUR

The Watershed School

Boulder, CO

In its 11th year ~ coed • day • 60 students • grades 6-12

In the interest of full disclosure, I am a trustee on the board of The Watershed School and I was on the search committee. Sarah DeSouza, Ed.D. was the chair of the committee and while this was a new experience for her, she has great experience in executive recruiting in her current government position.

Watershed is a very small and very young school. The total budget is just over \$1 million, making a traditional search with any of the common search firms prohibitive. Even with the discounted pricing offered by a couple of the traditional firms, the committee looked for alternatives and considered conducting the search without a consultant. Ultimately, the committee decided to hire a small local HR consulting firm, HR Concierge, which consists of just one person, Christine Lipson. Ms. Lipson is an SPHR, has been involved in a number of executive searches, and has worked as the HR/Operations Director at an independent school for over 10 years. She quoted the committee a flat fee of \$12,000 to manage the search. Dr. DeSouza fully recognized that one piece Watershed would give up (to some extent) with this decision was the connection to people currently employed at independent schools. However, given the fact that Watershed is considered by some as nontraditional (I prefer innovative and progressive) the search committee knew it was unlikely that Watershed would attract the typical candidates and unlikely that they would be a good fit. Social media was used extensively in announcing the open position.

In most other respects, the search process followed a typical timeline and process. There were a couple of important differences, however. In an effort to conserve financial resources, the first round of semi-finalist interviews (10 in all) was conducted using Skype. The added benefit of this approach is it allowed the committee to evaluate candidates on their ability to use the technology appropriately, which is important for the school's culture and programs. A second round of semi-finalist interviews was also conducted using Skype. The next decision that was out of the ordinary is that the committee decided there was only one person that they wanted to consider as a finalist and that person was invited to visit the school. DeSouza was clear with the committee that this was not a decision to hire this person; if the committee was not satisfied, the committee was prepared to start over. The school had an interim head who had been at the school as Dean of Faculty, and although he was not interested in the permanent head position, the committee was confident that he would stay on as interim if the right head was not found. DeSouza did tell me that her only fear during the process was that the candidate would say no to an offer once the committee had decided to make one.

The school's culture drove the process. The search committee included board members, non-board parents, the interim head, and other faculty. Students were very involved in the interview process and during the candidate's first visit to the school most of the time was spent with students. The committee received feedback from the students and the faculty involved in this process.

The new head, Greg Bamford, has worked in independent schools first as an English teacher and then as the English Department chair, the only real administrative position he held at a school. He left school to work as a corporate consultant and facilitator, and later he founded a nonprofit focused on educational innovation. He decided to look at the Watershed position as an opportunity to take the work he had been doing consulting and put it into practice. This is similar to the decision made by Mr. Palfrey, to step away from his tenured position at Harvard to move to Andover and see if he could put into practice what he had been researching for years.

Mr. Bamford did tell me that the process was exhausting but also very rewarding and it provided him with the opportunity to determine if Watershed, moving to Boulder, working with the board, etc. would be the right fit for him.

Dr. DeSouza did not move into the board chair role (she remains a trustee) and the board chair at the time of the search did leave the board. However, this was all very transparent for the candidate and the incoming board chair was very visible and part of the process. There were no surprises for either of the two new leaders of the school. Mr. Bamford is in his first year, so a determination of success will need to wait. The process was successful.

TAKEAWAYS

Based on my research and interviews, here are a few key points I would recommend to schools as they think about the leadership transition process:

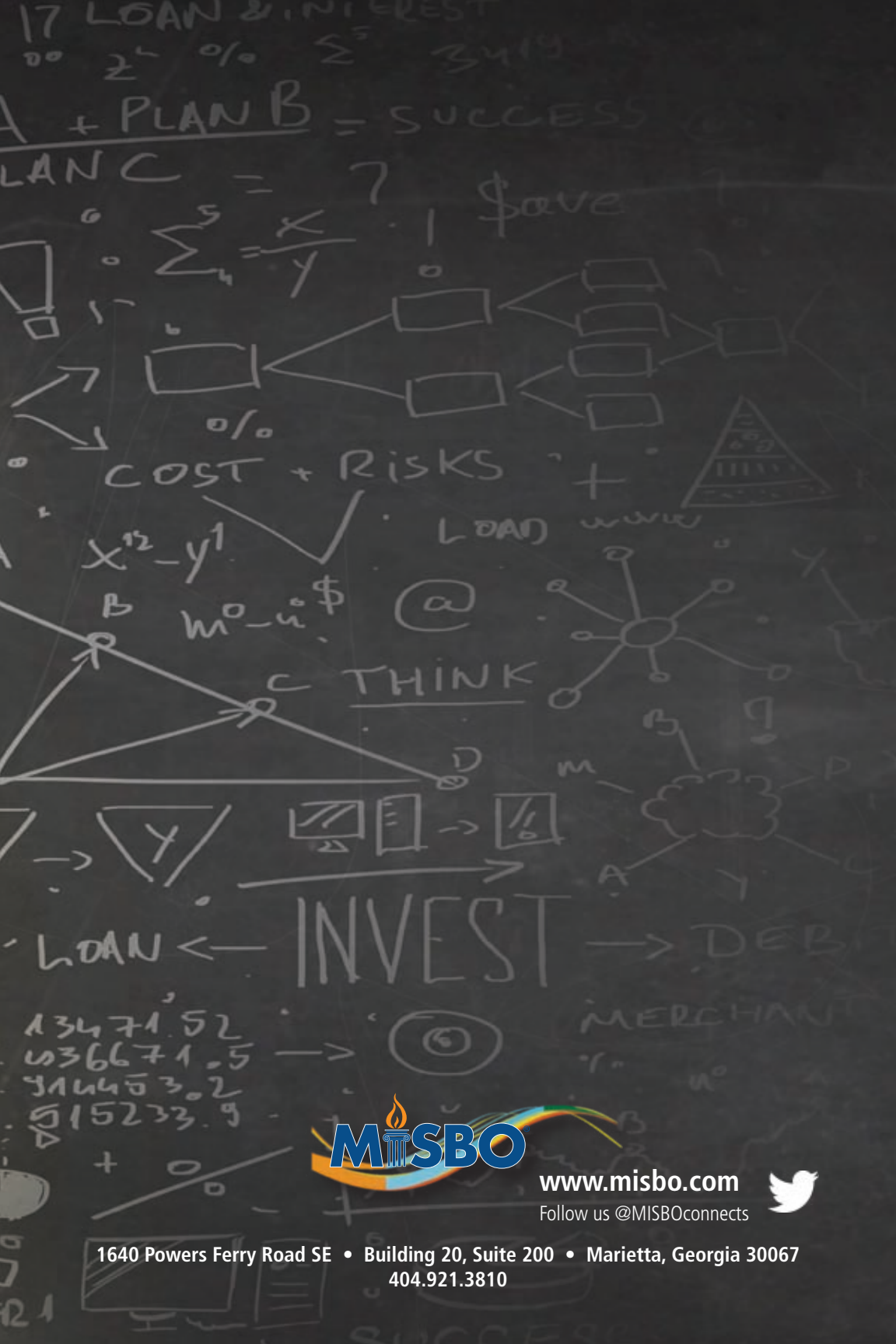
- 1) Board leadership is critical to the success of the head of school transition. I suggest that as a best practice, search committee chairs be designated as the next board chair. This could be timed to coincide with the arrival of the new head or be a year or two later.
- 2) Boards need to look carefully at the concept of succession planning and build this into their thinking and expectations for the head of school. It is clear that in the corporate environment CEOs are expected to groom people to succeed them. Even in our smallest schools this is possible.
- 3) Leadership development must become a priority for our schools and the logical place for this to fall is with the associations that serve them. Succession planning will not be possible without the appropriate resources for leadership development. Some of this can be done internally at the school level, but more must be done on the state, regional, and national levels.
- 4) Boards need to consider the skills required to lead a 21st century school and that these may be different than what has been successful in the past. We are in the midst of a rapid transformation of our educational models and the traditional model of leadership is unlikely to be successful for an innovative, progressive school.
- 5) Boards need to consider looking outside of traditional places for new heads. First, they must consider people who have had no experience as a head of school but who are knowledgeable about education and organizational leadership. Second, while not discounting people who have come up through the teaching ranks, they also need to look at people who have not been teachers. Third, they need to look outside of independent schools for more options. Again, the challenge is to match the skills required and the school's culture with the person to lead.
- 6) Finally, the search firms that have served independent schools well for decades need to consider changing their approach; otherwise other nontraditional search firms will continue to gain a stronger position in this market.

I believe in the future of independent schools and the education that our schools provide for our children. In order for that future to become a reality, we need the best leaders we can possibly find. It's time to get better at finding them.



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