

Insights from New Leaders

CAIS 2010

Independent Thinking

The Survey

Conducted Spring 2009

81% (43-53) of July 2009 heads responded
62% (67-90) of July 2008 heads responded

Gender Breakdown:

July 2009: 79% male, 21% female

July 2008: 82% male, 18% female

Year of undergraduate college graduation:

65-69: 6

85-89: 24

70-74: 10

90-94: 21

75-79: 18

95-00: 2

80-84: 19

Not Listed: 3

Who Are They?

Graduate degrees: All but 1 in each group had at least one advanced degree. While most were MA, MS, MEd, other degrees represented included:

- JD-6
- MDiv-4
- EdD/PhD-18

Experience

Position immediately preceding appointment

- head of school-25
- interim head-3
- associate/asst head-28
- division director-28
- director of admission-4
- director of development-2
- dean of faculty-2
- dean of students-1
- director of college counseling-1
- other-8 (includes- college president, superintendent of schools, association ED, public school principal, consultant, summer programs director, counselor)

Additional Experience...

- head of school-14
- interim HOS-3
- assoc/asst Head-16
- **division director-39**
- **admissions exp-29**
- development exp-12
- **dean of students-25**
- dir of college coun-10
- CFO/business mgr-3
- department chair-20
- athletic director-3
- dean of faculty-5
- academic dean-6
- dir. of diversity-1
- Other (21): attorney, consultant, business/banking/finance college president, chaplain, summer program director, association ED

Experience Thoughts

- **Virtually all of these heads have significant teaching experience: 11 of 103 had no teaching experience while 57 had more than ten years of teaching experience.**
- **Less than 50% have prior EXTERNAL relations experience-- despite the role of HOS being described by many as one that is 60-80% focused on external relations.**
- **Very few candidates have business/ finance experience (less than 5%).**
- **While there is much conversation about leadership succession planning by grooming someone internally for the role, only 14% of these heads had a prior professional relationship with the school they are now leading.**

Words from the Initiated

What best prepared you to be a head of school?

“WOW -- I wonder if anything can really prepare you for this job... I think that my background in both academics and in admission/external affairs was a perfect combination. Admissions is, after all, the only internal/external office in a school, other than the head. Where else do you learn about finances, academic program, assessment, etc.?”

- ❑ Having other school positions that involved real and actual decision making.
- ❑ Watching good and not-so-good heads ply their craft.

Words from the Initiated

What best prepared you to be a head of school?

- The breadth and depth of my various previous independent school positions.
- A mentor relationship*.
- The opportunities I was given to learn about aspects of independent schools not directly related to my position at the time.

What do you wish you knew more about when you started?

Finance

- ❑ I have several years of banking experience and I think it really saved me. Understanding the financials that have to be dealt with as a Head of School is crucial. I think you can never have enough preparation in the financial area.
- ❑ Better foothold on the details of Finance.
- ❑ Financial matters!!!!
- ❑ I wish that I knew more about the overall finance issues regarding all schools.

What do you wish you knew more about when you started?

Fundraising/ development

- ❑ Asking for money isn't as easy as one might think.
- ❑ Development has been my blind spot.
- ❑ I had to learn the "ins and outs" (I am still learning) of development

What do you wish you knew more about when you started?

Boards:

- ❑ The ins and outs of working with Boards; what makes a good Board.
- ❑ The importance and necessary skill of managing my bosses - the Board.
- ❑ How to engage a board of trustees. More information on governance and the role of the head in board leadership.
- ❑ I wish that I had known more about how Boards work and especially the Board Chair and Head of School relationship.
- ❑ The overall dynamics of working with a fairly large (19 members) Board of Trustees. Much of my work revolves around working with the Board of Trustees and navigating issues and through the year with such a large group can be tricky.
- ❑ While I am blessed with an active, appreciative board, the relationship with them is still, even now, one year in, confusing. The board is my "boss," yet I have significant responsibility for selecting the members and leading them.

What do you wish you knew more about when you started?

- “Running a school is unlike any other school job, and one must experience it to understand that.”
- “How impossibly hard it is...I always worked very hard...but the expectations on Heads is unbelievable as well as what you yourself see as needed.”
- “The simple fact that I would have NO time during the day to reflect on anything, since I have people coming at me all day long with fires to put out.”

Words from the initiated

"In spite of the fact that my former head of school did EVERYTHING in her power to let me see what being a school head was like, I was still not prepared for the scope of the job. The hardest thing has been recognizing that the job is so big that there's really not any way to do it all."

"I think the lesson here is that no matter how prepared you feel going in, there will be surprises. You must expect that, not read it as a failure, and do what you must to equip yourself to deal with those surprises both from a strategic perspective and from an emotional one."

Words from the wise: Head to Board Advice

- ❑ One mistake heads make in the first year is trying to please everyone... Help head know about people with agendas.
- ❑ Governance issues tend to trip up heads. Commit to a retreat that deals with board operations and governance early on. Nothing else.
- ❑ Be honest. NO secret should be kept from the head.
- ❑ Give the head UNQUALIFIED public support.

Words from the wise: Head to Board Advice

- Know before you hire what your school's priorities/challenges are.
- Set clear goals. The Board as a whole - in conjunction with the head - should agree as to what the head's scorecard looks like.
- Run a thoughtful evaluation process that involves trustees, reps to the board and management team only. Do NOT send surveys to the parents and faculty. It is essential that only those who have a complete understanding of the head's job are involved in the evaluation process.

Words from the wise: Head to Board Advice

- There should be structured opportunities for the new head to offer his or her perspective on how to move the school forward.
- Keeping the head (and head's family) feeling well-supported through the good times and the bad, through successes and mistakes is a big part of the work of every trustee.
- Ask the head what he or she needs. Send supportive emails, laugh and listen. Attend to the spouse and kids as well.

Words from the wise: Head to Board Advice

- “For a new head, the challenge is to realize that his or her experience cannot possibly be broad enough to handle the multi-faceted aspects of the Head position. The Board’s challenge is to recognize that these gaps exist.”
- “After a head search is completed, schools are often anxious to move along with the work of the school, **forgetting that building relationships is the real work.** The real work is to acclimatize the head with the many constituents- which should be reflected in the head’s goals.”

Conclusions:

- Plan: don't neglect to discuss succession. Many head of school searches are launched 12-15 months prior to the actual change.
- Realize that different leadership strengths are needed at different times in a school's history; make sure part of your search process considers the challenges before your school and the leadership strengths needed to navigate those successfully.

Conclusions:

- Most independent schools engage a search consultant. The job of the search consultant should reach beyond identifying and vetting candidates. A good search consultant will help prepare the Board and the school community for the transition.
- “The goal of a search is not ‘the wedding’ – it is the marriage. No new head turns out to be any more perfect than a new bride or groom. Making “the marriage” work takes effort on everyone’s part.”

Thank you



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