



# Hiring Your Next Head of School:

## The Process, Step by Step

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# The Head of School Search: An Introduction and an Overview

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## What you need to know now:

- ✓ Roles and Responsibilities
- ✓ Principles of Good Practice
- ✓ How the Process Will Unfold
- ✓ The Importance of Communication Throughout the Process

All of us at Wickenden Associates are delighted that we have been retained to conduct your search. We are eager to work with you and your colleagues to find an outstanding Head of School. This manual is our attempt to guide the Search Committee step by step through a process that can sometimes be complex and challenging.

Our intent is not to be proscriptive; rather, it is our hope that by sharing with you our experience with practices that have worked well – and approaches that have created problems – we can make this process both rewarding and highly successful.

The search for new leadership can be an unsettling event in the life of the school, but it can also be an opportunity for institutional renewal, growth, and discovery.

Clearly, the Search Committee faces some hard work in the months ahead. But if you take the time now to discuss what it is you are looking for in a new Head and then follow the procedures outlined in this manual, the chances are great that you will reap the benefits of a successful search. And if you can accomplish that, your time and effort will have been well spent indeed.

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**At the end of most sections of this manual, you will find references to online resources and documents that provide additional information. All of these items may be viewed and printed from our website. Visit [www.wickenden.com](http://www.wickenden.com) and click on "Client Resources" on our homepage and enter the credentials below.**

**Username: wahos**  
**Password (case sensitive): WA?head1000!**

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Let's get started!

### Roles and Responsibilities

Wickenden Associates looks forward to a productive and enjoyable partnership with the Search Committee and other members of the school family who will be engaged in one way or another in the search process. Here is a brief outline of the division of responsibilities you can expect.

#### THE ROLE OF WICKENDEN ASSOCIATES

We will assume primary responsibility in the following areas:

- Honest feedback to the committee about the current state of affairs at the school, based upon our own research. Unlike Search Committee members, whose arena of knowledge may well be limited to their own school, we will provide not only information about the school, but also a perspective on how its situation compares to that of comparable institutions.
- Management of web-based survey instruments for gathering input from the school community at the beginning of the search and during the finalist visits.
- Guidance and sample documents for communications with the school community throughout the process.
- Development and distribution of recruitment materials, including our comprehensive Opportunity Statement and advertisements.
- Administrative support, including providing information to potential candidates, scheduling the semifinalist interviews and tours of the school, and fielding questions at every stage of the process.
- Development of a unique pool of candidates based on criteria set by the Search Committee, following up on referrals from within the school community and making full use of our extensive database and network of contacts.
- Presentation of the written credentials of recommended candidates to the Search Committee and facilitation of the meeting at which the Search Committee will choose semifinalists.
- Facilitation of the interviews of semifinalists, providing feedback and advice during the interviewing and decision-making processes.
- Comprehensive reference checks of finalists and compensation information.
- Advice about contract negotiations and the transition process.
- Periodic updates throughout the search process.

In addition to developing a close working relationship with your lead consultant(s), you will be supported throughout the search by various members of the Wickenden team, including our Search Coordinator, our Director of Publications and Research, and the associates who will be assisting the lead consultants in reference checking. As administrative managers, technical experts, and seasoned advisers, all of us at Wickenden Associates are committed to providing valuable structure and direction for the search. But these are truly support services, whose ultimate value will be determined by the quality of the work performed by the Search Committee.

### THE ROLE OF THE SEARCH COMMITTEE

Serving as a Search Committee member can be both rewarding and demanding. The Search Committee has five key responsibilities:

1. Define as specifically as possible the nature of the job the next Head of School will be asked to do as well as the professional and personal attributes s/he ideally should possess.
2. Rigorously evaluate the candidates – on paper and in person – to identify the one who best fits the school’s culture and needs at this time.
3. Affirmatively recruit promising candidates and their families by ensuring that they are warmly welcomed, treated with respect throughout the process, and well informed about the most appealing aspects of the opportunity and the community.
4. Recommend one candidate to the Board of Trustees.
5. Appropriately inform and engage the school community throughout the search.

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**At several pivotal points in the search, it will be vitally important that you make time in your schedule for the essential meetings at which key decisions will be made.**

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During our initial information-gathering visit to the school, we will meet with the Search Committee to set a calendar so that you can reserve these important dates well in advance.

As the process unfolds, you will be asked to digest and respond to a great deal of written material, including the draft Opportunity Statement and online feedback from the school community; application materials supplied by the candidates; interview reports and reference checks conducted by Wickenden Associates; and evaluations of the finalists provided by those who meet with them.

#### **The Balancing Act**

At each stage of the search, committee members must balance competing needs and interests:

- The need to evaluate honestly the school’s present condition and challenges against the desire to present the job opportunity to candidates in the most positive light.
- The need to “sell the opportunity” to strong candidates (and their spouses, if applicable) while at the same time rigorously assessing their suitability for the position.
- The desire to foster a sense of inclusion in the process among all the school’s

constituencies while retaining for the Board its rightful role as ultimate decision maker.

- The desire within the committee to reach consensus, sometimes in the face of widely varying perspectives about the school's needs and the candidates' relative strengths.

### THE ROLE OF THE COMMITTEE CHAIR

Wickenden Associates has had the privilege of working with hundreds of Search Chairs, and we remain awed by the breadth of their contributions and the depth of their commitment to their schools. Leading a search is not easy. The best Chairs promote an atmosphere of mutual respect among Search Committee members and set the expectation that all will respect the confidentiality of the process and subordinate personal agendas to the greater good of the school. They manage complex meetings effectively, balancing opportunities for all to contribute with the need to make decisions. They project an air of openness to the school community and warmth to invited candidates.

We have worked successfully with Chairs who have a great deal of time to commit to the process and Chairs who juggle many other professional and personal obligations. Depending upon the Chair's skills and availability, s/he will want to allow time for – or specifically delegate to someone else – the following:

- Ensuring that periodic communications from the committee to the community are both professional and timely.
- Coordinating with the Board President on issues that require Board attention and ensuring that the Board is regularly updated on the progress of the search.
- Managing the day-to-day coordination and communications with Wickenden Associates related to our initial visit, editing of the Opportunity Statement, Search Committee meetings, scheduling of candidate interviews, etc.

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**To make the entire search process flow more smoothly for both the Search Chair and Wickenden Associates, it is extremely valuable to have someone at the school serve as an administrative liaison throughout the search.**

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While we will do everything we can to reduce the administrative burden placed on the school, there are many details – requests for data, meeting scheduling, communications with constituents, decisions about candidate accommodations, etc. – that will require the attention of someone who is well organized and knows how the school works. It can be helpful (but is not necessary) for this contact person to be a member of the Search Committee. Other possible candidates are the Head's Assistant, the Business Manager, the Communications Director, or a faculty member.

ENGAGING  
OTHERS  
IN THE PROCESS

**Advisory Committees**

While advisory committees are not a necessary component of the search process, search committees sometimes choose to encourage and organize input from the various school constituencies by creating an advisory group composed of faculty, parents, and/or alumni. In particular, such a group can be valuable if no faculty members are included on the Search Committee.

Wickenden Associates typically meets with the advisory group at the beginning of the search to gather their impressions about the school and its leadership needs. The Advisory Committee is sometimes invited by the Search Committee to review the draft Opportunity Statement and make suggestions for revisions and additions. While Advisory Committee members don't participate in Search Committee interviews or deliberations, they can play a valuable role during finalist visits, both as guides and as evaluators of the candidates and as hosts for the spouses.

Deciding who will serve on the advisory groups is always a complicated political issue. Often, the Search Committee's best bet is to ask existing organizations representing the various constituencies – the parent association, alumni council, or the faculty as a whole – to nominate candidates to the advisory committee. The Search Committee should, however, reserve the right to make the final decisions about the membership of this group.

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**We recommend that one member of the Search Committee be appointed to the Advisory Committee to maintain healthy communication between the two groups and to ensure that the Advisory Committee stays on task.**

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Whatever the eventual composition of the advisory body, the Search Committee must tactfully but firmly make clear to the advisors that their role is in fact advisory, and that all decisions ultimately rest with the Search Committee.

**The Current Head of School**

It is difficult to state unequivocally how the current Head of School should be involved in the process because of the myriad possible circumstances surrounding his or her impending departure. Generally, we suggest that the outgoing Head should maintain an arm's-length relationship with the search, not becoming actively involved in the evaluation or recruitment of candidates. The Head might be asked to review the draft Opportunity Statement for accuracy, but should not be permitted to unduly influence its contents. In most cases, it is simply too much to expect that the current holder of the position can be sufficiently objective about the school's needs or the qualities his or her successor should possess! At the same time, it is important that the outgoing Head is treated with respect and appropriately informed about the progress of the search. Typically, the Head is included on the interview schedules of the finalists.

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## An Introduction and Overview of the Search Process

If the school is being led by an experienced Interim Head hired from outside the school family, s/he can be a valuable adviser to the Search Chair and a great asset during the finalist interview stage by providing candidates with an insider/outsider perspective on the school community and the opportunities awaiting the next Head.

### A WORD ABOUT CONFIDENTIALITY

As a Search Committee member, you are certain to be approached by members of the school community and others who are interested in the progress of the search. Some will have heard rumors about who is applying for the position and will be seeking confirmation. Faculty members serving on the Search Committee will be particularly vulnerable to colleagues looking for information about candidates; they should be prepared to respond to persistent questioning and requests for updates with polite but neutral comments that do not violate confidentiality.

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**It is our view that from the beginning of the process through the semifinalist stage, all applicants are entitled to the expectation of confidentiality. It is vital that this implied promise of confidentiality to the candidates not be breached deliberately or accidentally by anyone. The independent school world is a small one; a careless remark might well jeopardize a candidate's standing at his or her school.**

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Those who reach the finalist stage, on the other hand, should not expect their candidacies to remain confidential in the face of extensive reference checking and their visibility while at your school.

Even when the identities of the candidates are public, however, there is still a great deal of information that Search Committee members will need to safeguard. Chief among these are the multiple reference reports we conduct on finalists, which are highly confidential. The application information of the presented candidates and of the semifinalists should be shredded immediately following the decision to eliminate those candidates from consideration. Reference checks and interview reports for finalists and for the candidate who is appointed must also be shredded upon completion of the search.

### PRINCIPLES OF GOOD PRACTICE

Wickenden Associates supports and adheres to the ***National Association of Independent Schools (NAIS) Principles of Good Practice for Independent School Search Committees and Search Consultants***, revised and approved by the NAIS Board in 2003 and reprinted by permission on the following page:

## **NAIS Principles of Good Practice for Independent School Search Committees & Search Consultants**

*The following principles of good practice are designed to help Search Committees as they embark upon the task of selecting a school Head. Each school must decide for itself whether or not it will retain a consultant to help with the search. If the school does decide to engage professional counsel, the same principles should be observed.*

1. The Board and Search Committee should devise a search process that is viewed as fair, orderly, and cost-effective by all parts of the school community.
2. The Search Committee should actively solicit the names of the best available candidates drawn from a broad candidate group without regard to age, race, religion, gender, or national origin unless the school has a religious mission that requires the Head to have a particular religious affiliation.
3. The Search Committee should see pertinent materials related to any and all candidates, including applications that come from outside the consultant's regular network.
4. The Search Committee should recognize the sensitivity of visits by trustees to a candidate's present school. The consultant should work with the Search Committee and candidate to see that such visits are complete and thorough yet at no time jeopardize the relation of the candidate to his or her present school. School visits should be made only when the candidate and Search Committee are at a mutually serious stage.
5. The Search Committee should make every effort to present the school with a diverse group of candidates. All principles associated with providing equal opportunity should be observed in the process.

### **Regarding Consultants**

1. The search consultant should make every effort to present the school with a diverse group of candidates. All principles associated with providing equal opportunity should be observed in the process.
2. In outlining procedures to the Search Committee, the consultant should provide a full written description of services offered, including expenses and fees. In the case of a consulting firm, the Search Committee should be told which person in the firm will do the search and should interview that person prior to any contracting for services.
3. The consultant should make known the names of other schools for which he or she actively is performing a search for persons to fill a similar position.
4. The consultant should limit searches during any given period to a number that will assure service of high quality to each client school.
5. The search consultant should make a reasonable effort to understand the school, its mission, its culture, and the nature of the position to be filled.
6. The school, not the individual candidate, should always be the client.
7. Both consultant and Search Committee should check candidates' references with great care. The consultant is responsible for presenting a candidate for consideration by the Search Committee and for emphasizing the committee's responsibility after that time.
8. The consultant should respect the confidentiality of each candidacy and impress upon both Search Committee and candidates the importance of discretion. Any candidate now a Head who is seriously exploring other school Headships should so inform his or her current Board chair in confidence.
9. The consultant should keep the Search Committee fully informed about the progress of the assignment throughout the search and ensure that each candidate is informed fully and promptly about the status of his or her candidacy.
10. The consultant should refrain from inviting the Head of a school placed in that position by the consultant's firm within the past five years to become a candidate for the client school.
11. No consultant or any member of the consultant's firm should be a candidate for a position in which the consultant is conducting a search.

### An Overview of the Search Process

The table on the next page illustrates a typical timeline for a Head of School search employing our standard process. The table also outlines key tasks for Wickenden Associates and the Search Committee at each stage.

Please keep in mind that there is an ebb and flow to the search process. After an initial flurry of activity surrounding the launch of the search and the development of the Opportunity Statement, there will be a period of relative quiet for the Search Committee while Wickenden Associates is actively engaged in building the pool of candidates. Your work will pick up again during the Credential Review process, when you will need to devote significant attention to sorting through the candidate materials to choose semifinalists. Shortly thereafter, you will participate in a long weekend of semifinalist interviews – followed within the next several weeks by two-day visits to the school by your finalists. In preparation for your final decision, you will be poring over multiple reference reports and feedback from the many members of your community who will participate in the finalist interview process.

Your search process and timeline may vary somewhat, based on the time of year at which the search is launched and any changes to the standard process that the committee might request. Throughout the remainder of this manual, we will discuss each phase of the process in detail.



## Timeline for a Typical Head Search

| Search Phase:                        | Launching the Search  |   | Casting the Net  |           |            |             | Narrowing the Field   |   | Auditioning the Candidates   |   |                                     | Closing the Deal  |
|--------------------------------------|---|---|--|-----------|------------|-------------|---|---|--|---|-------------------------------------|---|
| Typical Timeframe                    | Weeks 1-2   | Weeks 3-4   | Weeks 5-6  | Weeks 7-8 | Weeks 9-10 | Weeks 11-12 | Weeks 13-14   | Week 15-16  | Weeks 17-18  | Weeks 19-20   | Weeks 21-22                         | Weeks 23-24   |
| <b>Role of the Search Committee:</b> | Provide update to school family<br><br>Approve search calendar    | Debate key elements of the job and qualities sought in new Head<br><br>Review and approve Opportunity Statement | Provide update to school family on search progress<br><br>Send referrals to WA<br><br>Search Chair periodically discusses recruitment progress and strategies with WA  |           |            |             | Set aside several hours to read and evaluate candidate credentials  | Participate in three-hour meeting to select semifinalists   | Participate in full weekend of semifinalist interviews<br><br>Select finalists | Plan, schedule, and complete two-day finalist visits<br><br>Reach out to finalists to sell the opportunity<br><br>Update school family on progress                              |                                     | Review references and evaluations<br><br>Recommend candidate to Board<br><br>Negotiate contract |
| <b>Role of Wickenden Associates:</b> | Visit school, meet with Search Committee<br><br>Launch web survey | Draft Opportunity Statement   | Advertise in print and online venues<br><br>Search WA database for candidates and follow up on referrals<br><br>Telephone prospective candidates and sources<br><br>Conduct interviews with new candidates when possible<br><br>Conduct initial reference checks on applicants |           |            |             | Screen candidates and send credentials notebook to Search Committee | Facilitate Search Committee meeting to select semifinalists<br><br>Notify applicants not selected | Schedule semifinalist visits<br><br>Facilitate semifinalist interviews         | Conduct comprehensive reference checks on finalists<br><br>Collect current candidate compensation information<br><br>Manage online evaluation process for finalist interviewers | Advise and support Search Committee |   |

**Note:** This sample timeline illustrates a six-month search process that is typical of Head searches we launch in the late spring. For searches started in late summer or early fall, we typically work with the Search Committee to develop a compressed schedule that allows the search to be completed by January. We do this primarily by reducing the number of weeks dedicated to "casting the net" – the pool-building phase of the search.

### POTENTIAL PITFALLS AS THE PROCESS UNFOLDS

An unsatisfactory search can usually be traced to one or more of the following missteps:

- **Perfectionism.** Throughout the process, the committee and the school community should bear in mind that the “perfect candidate” – one without shortcomings or flaws – does not exist. Committees do best when they seek the best possible fit between school and candidate, concentrating on finding a new Head who will share the school community’s vision, goals, and values.
- **Single-issue hiring.** Appointing a candidate on the basis of his or her ability to solve an immediate and pressing problem at the school can quickly backfire. Unless the candidate is also committed to fulfilling the mission of the school over the long term, such an appointment is likely to be a short-term one. Similarly, the Search Committee should beware the natural tendency to rate candidates on the basis of their similarity to the well-liked departing Head or their lack of similarity to an unpopular departing Head. These comparisons of superficial traits, which may seem important and relevant while the current Head remains on campus, often prove inconsequential in the long run.
- **Hidden agendas.** Occasionally, search committees become factionalized when it becomes apparent that one or more trustees intend to steer the process toward a preordained outcome. In our view, this is disrespectful to Search Committee members who have agreed to devote their time and energies to an open process. Furthermore, such an appointment is unlikely to result in a smooth entry for the new Head.
- **Risk avoidance.** While individual Search Committee members may be bold and risk-oriented, search committees as a group tend to be conservative. As a result, they occasionally find themselves leaning toward appointing an internal candidate, reasoning that a known quantity – even one with significant shortcomings – is preferable to an unknown one. The same line of thinking often renders committees eager to appoint the Interim Head to the permanent position. An internal candidate or Interim Head might prove to be the best choice for the job, but the selection should always represent an affirmative choice rather than a preference for “the devil we know.”
- **Relying too much on gut reactions.** Committees sometimes place too much emphasis on the performance of a candidate in interviews. While interviews can certainly be telling, it is also true that experienced Heads generally interview better than those who have never been Heads, although they are not necessarily stronger candidates. The ability to relate socially during the interview process can also be given undue weight. The most likable and on seemingly knowledgeable candidate is not necessarily the best one, and past performance (as judged by work history and references) is a far better predictor of future performance.
- **Outside pressure.** Undue emphasis also can be placed on the reactions of a particular constituency. While all opinions should be heard, the Search

Committee cannot afford to abdicate its responsibility to consider the candidates' qualifications for all aspects of headship, including those which might be of little concern to some groups.

- **Lack of disclosure.** A lack of full disclosure by any of the parties in a search can result in unpleasant surprises and immediate damage to the working relationship between Head and Board. The committee that minimizes a school's problems or fails to make clear its expectations of the Head and the Head's family does itself no favors.
- **Settling for an unsatisfactory choice.** Above all, the Search Committee must resist the temptation to appoint a less than satisfactory candidate just to complete the search. Other options are always available: The acting Head's term might be extended, for example, or an Interim Head appointed. Reopening the search may net a new group of qualified candidates. While the prospect of returning to the drawing board late in the search process might be unappealing, it is nonetheless preferable to the alternative of hiring a new Head who does not enjoy the full confidence of the trustees. To do that is to squander the bright promise inherent in any transition to new leadership.

### COMMUNICATING WITH THE SCHOOL FAMILY

Each school has its own culture of communications. The flow of information among the Board, administrators, faculty, parents, students, and alumni is a critical factor in creating the prevailing mood on campus – for good or ill. From the moment that the need for a Head of School search becomes apparent, the Board and Search Committee leadership should begin planning a robust communications effort that will continue throughout the search process.

Perhaps one of the least obvious but most important functions of the Board and Search Chair is to manage the flow of information so that a genuine sense of openness and inclusion is conveyed to all members of the school family. A search conducted under a veil of secrecy will leave faculty, administrators, and parents apprehensive at best, suspicious or disaffected at worst. Attention to this aspect of the search is particularly important at schools that are already in flux, perhaps as a result of the firing of the current Head, faculty morale problems, or an enrollment or budget crisis.

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**To assist the Board, Search Chair, and school administration with this vital effort, Wickenden Associates provides a *Head of School Search Communications Planning Guide*, which includes a suggested timeline and sample communications for each stage of the process.**

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If the school has a Director of Communications, s/he should be involved in this effort from the beginning; a high level of professionalism in these communications promotes confidence in the process. Search committees should always err on the side of providing more information than they think the school community expects to receive. Customarily,

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## An Introduction and Overview of the Search Process

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the formal announcement of a Head search begins with the publication of letters from both the outgoing Head and the Board Chair, recapping the Head's accomplishments and providing broad information about the process that will follow. Additional communications typically follow when the consultant visits the school to conduct interviews, when semifinalists are selected (though their names are not disclosed), when finalist interviews are scheduled, and when the new Head is hired. Today, most schools also use the website and social networking tools to communicate these announcements.

Communications channels should flow both ways, providing members of the school community with opportunities to share their views with the consultant and the Search Committee. Wickenden Associates provides and manages online vehicles for communication both at the outset of the search and at the finalist interview stage.

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### Additional Resources and Tools on our "Client Resources" page:

- ✓ [Undertaking a Head of School Search? Six Steps Your Board Should Take To Promote a Successful Leadership Transition \(Wickenden Associates monograph\)](#)
- ✓ [Wickenden Associates Head of School Search Communications Planning Guide](#)

(To view or print all resource documents, visit our website: [www.wickenden.com](http://www.wickenden.com).)



# Phase 1: Launching the Search

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## Key facets of this phase:

- ✓ Planning and Executing Our Initial Visit
- ✓ Setting the Search Calendar
- ✓ Defining the Job and Developing the Opportunity Statement

Heads of Schools – even the best of them – are neither saviors nor magicians, although their various constituencies sometimes seem to expect that they will be both. If you want your new Head of School to succeed, you must first lay out, in writing, the nature of the task at hand. Serious candidates want to know what will be expected of them if they get the job. For the Search Committee, the first phase of the search process is largely dedicated to defining the essential aspects of this headship and ensuring that the particulars of the opportunity are well communicated to prospective candidates.

## The Consultant's Initial Fact-Finding Visit

To kick off the search process, Wickenden Associates will visit the school for an intensive series of interviews with a broad cross-section of the school community. During these interviews with administrators, faculty, parents, students, trustees, and often local alumni, we will collect information for an Opportunity Statement that provides factual information about the school; an assessment of the school's strengths and challenges; and a list of the qualities, skills, and kinds of experience the new Head should bring to the position. Someone on the Search Committee or in the administration will need to assume the responsibility of developing an interview schedule for these meetings and handling the logistics of getting the interviewees together with the consultant(s).

### The Online Survey

For members of the school community who do not have the opportunity to meet with the consultant during this initial visit, we offer an anonymous online survey that allows individuals to share their views about the school's strengths and challenges as well as the qualities they view as most important in the new Head. The survey also provides a vehicle for respondents to offer nominations.

A transcript of the responses is shared with the Search Committee and used by Wickenden Associates as another resource in the development of the Opportunity Statement, as well as to enhance the consultant's understanding of the culture and needs of the school.

**THE  
OPPORTUNITY  
STATEMENT**

For a task as complicated as running a school, a generic job description will not suffice. As a first step in defining the nature of the opportunity, Wickenden Associates will prepare a detailed Opportunity Statement, which we make available to all prospective candidates. Schools often post the document on their website as well.

**The Opportunity Statement Review Process**

Approximately two to three weeks after our initial visit, we will complete a draft of the Opportunity Statement for the Search Committee's review and approval. Because this document is prepared and published by Wickenden Associates rather than the school, prospective candidates view it as an important outside perspective on the institution and the nature of the headship position.

Although we welcome the committee's thoughtful review of the document, we encourage committee members to resist the temptation to tone down the discussion of challenges facing the school. Committees sometimes worry that any suggestion of problems at a school will scare away good candidates, but it has been our experience that capable leaders recognize that all schools face challenges of one sort or another and welcome the opportunity to make a real difference in the life of an institution. Further, we believe it would be a disservice to both the school and the future Head if the nature of the job – including the tough parts – were not made clear. You do not want to appoint a Head of School who is unwilling, uninterested, or unprepared to meet your school's most pressing needs.

While we recommend that the Opportunity Statement document be as specific and direct as possible about the school's present situation and challenges, we encourage you at this stage in the process to be flexible and open-minded about the qualifications and kinds of experience the next Head should have. Sometimes, for example, search committees begin the process with a firm idea that the new Head must be a person with Head of School experience, perhaps because a prior appointment of a first-time Head did not work out well. We believe that such a narrow approach is often counterproductive, discouraging excellent candidates from applying while giving undue weight to a candidate's title rather than his or her talents. Not all experienced Heads are successful leaders, and many non-Heads are more than ready to assume the responsibilities of headship.

Similarly, we urge committees at this stage in the process not to be overly concerned with specific types of experience. Often, for example, a committee will want to specify that a candidate must have demonstrated fundraising experience. Unless raising very large sums of money will be the top and most immediate priority for the new Head, we think the committee would be better off indicating that a *willingness* to fundraise is required. A talented, personable, articulate, and enthusiastic new Head can learn the skills necessary to succeed at raising money for the school – and not all Heads with fundraising experience are good at it.

It is important, on the other hand, for the committee to be very specific about truly non-negotiable qualities. If, for example, the candidate must be a practicing member of the religion with which the school is affiliated, that should be made clear in the document.

**THE CHARGE  
TO THE HEAD**

Because the Opportunity Statement will be the primary recruitment document for the search, the Search Committee should focus its efforts on ensuring that it accurately reflects the school's leadership needs. We also recommend, however, that every Board in the process of a Head search take two additional steps:

1. Review the school's Mission Statement and either affirm or revise it as appropriate.
2. Produce a Charge to the Head, a brief document that will outline the Board's expectations for the new leader during the first years of his or her tenure.

Unlike the Opportunity Statement, the mission review and Charge to the Head are responsibilities of the full Board rather than the Search Committee. The challenges identified in the completed Opportunity Statement, however, will provide a solid starting point for the Charge, which ideally will be completed and ratified by the Board prior to the visits of the finalists. The Search Chair should collaborate with the Board Chair to accomplish that goal. *(A link to a sample Charge to the Head is included at the end of this chapter; we can provide additional examples upon request.)*

If thoughtfully prepared, these three documents can go a long way toward making sure that your new Head arrives poised to succeed.

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**Additional Resources and Tools on our "Client Resources" page:**

- ✓ [Launching the Search: A Checklist for the Search Committee Chair](#)
- ✓ [Sample Schedules for the Consultant Interviews](#)
- ✓ [Sample Charge to the Head](#)

(To view or print all resource documents, visit our website: [www.wickenden.com](http://www.wickenden.com).)



## Phase 2: Casting the Net

### Key facets of this phase:

- ✓ Advertising the Position
- ✓ Actively Recruiting Strong Candidates

### The Recruitment Strategy

While this phase of identifying and recruiting a deep candidate pool is typically one of the longest (ideally, eight weeks or more) and most important of the search process, it is a relatively quiet time for the Search Committee.

During this phase, which typically swings into high gear once the Opportunity Statement has been finalized, Wickenden Associates will do the following:

1. Post the Opportunity Statement on our website and feature the opportunity in our periodic email newsletter.
2. Place position announcements on a variety of low-cost (e.g. *The Blue Sheet*) and free sites tailored to the school's characteristics. These might include the jobs boards of relevant regional independent school associations, religious associations, and sites focused on boarding schools or single-sex education, for example. *(While we have not found paid advertisements in newspapers and national education journals to be particularly effective recruitment tools, we will advertise in those venues if requested by the Search Committee.)*
3. Search our database for potential candidates whose credentials appear to offer a good fit with the Search Committee's preferred qualifications and reach out to them via telephone or email.
4. Follow up on referrals from within the school community and from our own network of sources.
5. Conduct preliminary reference checks and, where possible, interviews with promising candidates.
6. Provide periodic updates to the Search Chair regarding our pool-building progress and reactions to the opportunity among the candidates we have approached.

While the lion's share of the work during this period falls to the consultants, the Search Chair and/or Search Committee members can contribute to a successful outcome by doing the following:

- Update the school family on the progress of the search, as outlined in our **Head of School Search Communications Planning Guide** (available on the "Client Resources" page at [www.wickenden.com](http://www.wickenden.com)).
- Provide referrals to Wickenden Associates as you receive them from members of the school family and other interested parties.
- Make yourselves available at our request to reach out to very strong candidates we have identified and who have expressed tentative interest in the position. Prospective leaders are often flattered to be courted early in the process.

### **POTENTIAL BUMPS IN THE ROAD**

With 25 years of experience building candidate pools for more than 330 Head of School searches, Wickenden Associates can usually predict with some accuracy the likely size and strength of the field of applicants. Many factors that are outside of our control and the control of the school will dictate to some extent the numbers of prospective leaders who will be tempted to apply. Among these variables are the school's location, size, and financial stability. Schools with religious affiliations or specialized missions – single-sex, boarding, schools for students with learning differences, etc. – typically draw smaller pools than nonsectarian coeducational college preparatory day schools. Ultimately, though, the size of the pool is far less important than its quality. After all, you need only one Head!

#### **Countering Negative Perceptions**

If we are casting the net widely with disappointing results, it may be that problems exist with the perception of the school in the broader educational community. News travels fast along the independent school grapevine, and prospective leaders may well steer clear of schools with a history of recent leadership instability or other governance issues. While that might be unwelcome news to trustees, the Search Committee should not miss the opportunity to define the nature of the problem, if one exists. When attractive potential candidates decline to apply, we will ask why and then report back to the committee. Schools can sometimes enhance their appeal to candidates simply by demonstrating a willingness to hear about and confront potential problems.

#### **Managing the Appearance of an Heir Apparent**

The presence of a strong internal candidate can function as a powerful disincentive to prospective applicants – who are generally not eager to enter a search in which they believe they are at a severe competitive disadvantage. For the purposes of building a robust pool, it should ideally be made clear from the outset that the Interim Head (if you have one) is not a candidate for the permanent position.

Other internal candidates, such as an Assistant Head or Division Director, offer a more complicated set of challenges. If the Search Committee does not believe the internal candidate is a viable choice, it is both a kindness to the candidate and a benefit to the search to discreetly discourage him or her from applying early on. We strongly advise

against “courtesy interviews” for such candidates in the belief that this well-intentioned practice merely postpones a difficult decision.

If the candidate *might* be viable but does not immediately enjoy strong enough support to justify an outright appointment, s/he should be invited to proceed through the process on an equal footing with all other candidates.

**Considering a Preemptive Strike**

Occasionally, search committees find themselves in an exciting yet challenging situation when an extraordinarily compelling candidate emerges early in the search process to express an interest in the position. Such candidates are likely to be aggressively recruited for a number of searches taking place simultaneously.

Should the committee consider making a preemptive offer to lock in the candidate even though that means curtailing the more inclusive search process that had been planned?

That depends on a number of factors, including the health of the school culture, the level of trust the Board enjoys within the school family, and the likelihood that the candidate would be warmly received by all constituencies.

While this situation has developed only rarely in our experience, it may begin to occur more frequently with an expected wave of Head of School retirements. Should you find yourself in this situation, Wickenden Associates is prepared to offer advice about ways to engineer a successful appointment while avoiding unwanted fallout.



## Phase 3: Narrowing the Field

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### Key facets of this phase:

- ✓ Sorting the Applicant Pool
- ✓ Evaluating the Credentials of the Strongest Candidates
- ✓ Selecting the Semifinalists

After several weeks of actively recruiting promising prospects for your next Head of School, Wickenden Associates is now ready to present you with the results. From this point forward, the volume and pace of activity for the Search Committee will increase rapidly. Get ready to read!

### THE CREDENTIAL REVIEW NOTEBOOK

Approximately one week before your scheduled credential review meeting, each member of the Search Committee will receive from us via FedEx a large notebook containing information about each of the candidates we are recommending for your consideration. To expedite your review of this document, we will organize the material into groups based on our assessment of the candidates' relative strengths.

Typically, the information provided for each candidate will include a résumé, a statement of educational philosophy, and any supporting materials each has supplied, as well as our Interview Report (if we have conducted an interview) and at least one preliminary Reference Report.

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**The notebook includes a simple ballot that Search Committee members can use to record their impressions about each candidate as they read the material in preparation for the credential review meeting.**

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It has been our experience that Search Committee members vary considerably in their willingness to digest all of this material. For those who prefer a more streamlined approach, we include a table with key information about each recommended candidate as well as a paragraph outlining our reasons for recommending the applicant.

We also provide in the notebook the names and titles of the applicants whom we are not recommending for your consideration. Typically, their materials are not included in the book, although we can arrange to bring those files to the meeting if there is interest among the committee in reviewing one or more of the applications.

As you prepare to peruse the notebook to identify the candidates you are most interested in meeting, a review of the Opportunity Statement will remind you of the specific qualities and qualifications the committee has already identified as most important in the next Head of School.

This is also a good time to consider more broadly the attributes you should be looking for as you study the credential materials. Here are a few suggestions:

**ESSENTIAL SKILLS,  
QUALITIES, AND  
PREPARATION  
FOR HEADSHIP**

While we are the first to argue that committees should seek a “goodness of fit” between candidate and school, we also believe certain basic qualities and specific types of training ought to be in the repertoire of virtually all candidates. Only the degree of importance of these traits will vary, depending upon the needs of the institution.

Thus, we advise Search Committees to focus on the following areas:

**Formal Educational Experiences**

Independent schools vary considerably in the emphasis they place on the academic credentials of their Head of School. Prestigious schools with high-powered faculty typically expect their Head to possess an undergraduate degree from a highly respected institution as well as a noteworthy terminal degree (often a Ph.D. or Ed.D.). At a minimum, most independent schools expect the candidate to hold a master’s degree. Although graduate education degrees are most common, we see many candidates with law or business degrees as well.

Many who populate the independent school world talk with disdain about education courses. Unfortunately, many schools of education deserve such criticism. But to tar all with the same brush is unwise. Certain graduate schools of education – including those affiliated with Columbia University, Harvard University, Stanford University, University of Pennsylvania, University of Wisconsin, and Vanderbilt University, to name a few – are wonderful training grounds for future Heads of Schools.

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**The Klingenstein Center at Columbia’s Teachers College is the nation’s most highly regarded master’s program dedicated specifically to independent school leadership. Many of our candidates have also participated in the yearlong NAIS/E.E. Ford Fellowship for aspiring independent school leaders.**

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Surely, anyone who aspires to lead a school should demonstrate through his or her own scholastic endeavors an appreciation for the life of the mind. In evaluating the educational credentials of the applicants, however, the Search Committee should take into consideration the academic culture of the school and the community’s expectations. In most schools, an otherwise promising candidate with modest academic credentials should not automatically be eliminated from consideration.

Bearing in mind that many candidates will be decades removed from their collegiate careers, we think it is also vitally important to evaluate the extent to which they have continued to pursue professional growth opportunities. The most impressive résumés provide evidence that the candidate has made diligent efforts to remain up to date on best practices in education and has taken steps to shore up his or her skills in areas that were not part of past academic training.

Workshops, seminars, courses, and fellowships all provide evidence of a commitment to ongoing education. Perhaps the most effective way to develop many of these skills, however, is through on-the-job training, ideally in a mentoring relationship with a successful Head.

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**Candidates who have sought out opportunities within their schools to practice new skills demonstrate that they are interested in becoming well-rounded leaders.**

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### **Fundamental Qualities and Skills**

- **A philosophical orientation.** While it might be useful for Heads to be well versed in Locke, Sartre, Hume, Aristotle, Plato and others, that is not what we mean when we say they should be philosophically oriented. Heads must be philosophically attuned to the mission of the school and oriented to using it to make fundamental decisions about the institution. The mission must define what the school is and what it is trying to do. Just as adolescents ask, “Who am I?” so Heads of Schools and Boards of Trustees must ask, “What is our mission?” If the Head and the Board do not agree on the answer, organizational dysfunction will result.

All too often, curricular and co-curricular decisions are a function of pressure from a constituency or the marketplace. Heads who are overly sensitive to political pressure will eventually preside over a programmatic smorgasbord, with no overriding philosophy to tie these offerings together.

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**While it might not have much value in predicting a Head’s eventual success, the statement of educational philosophy that we request from applicants can at least help the Search Committee to determine whether the candidate actually *has* a guiding philosophy.**

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- **A willingness to learn.** To remain educationally current and responsive in a rapidly changing educational environment, Heads of Schools must be committed to continuous professional growth. Search Committees should seek evidence that the candidates are eager to learn, adapt, and read – yes, read. We’ve interviewed more than a few candidates who stumble when asked the question, “What are you reading now?”

Of critical importance is a candidate's ability to grow as a leader and as a person. Gleaning evidence of this from cover letters, résumés, and interviews can be difficult. But Search Committees should seek information about a person's ability to assume increasingly responsible positions, to tolerate ambiguity, to make difficult decisions and live with the inevitable fallout, and to display equanimity in the face of criticism.

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**Search Committees would do well to look for candidates who have been employed at more than one school, who have worked under more than one Head, and/or who have made a concerted effort to visit other institutions to observe multiple programmatic and policy approaches. Your next Head should bring to your school different perspectives and new ways of solving problems.**

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- **Respect for teachers and the teaching profession.** Faculties in independent schools are much more dependent on the Head than most people realize. The Head plays a major role in the hiring and retention process, in determining salaries, in defining classroom assignments, in setting workload policies, and in implementing faculty evaluation and development systems. A Head who does not perform these duties well (or at least ensure that other administrators do) will oversee a stagnant school.

Because faculty members are so dependent on the Head, their relationship can sour quickly unless s/he is genuinely committed to their interests. Most teachers want to be recognized for a job well done, for their commitment to the students, for their willingness to uphold standards even in the face of criticism from entitled parents, and for improving curriculum or their teaching techniques. A Head who does not convey respect for these activities will develop the reputation of being distant and uninterested. And once a Head loses the support of the faculty, that person's days as the leader of the school are numbered.

- **Tolerance of stress.** Leading any organization is challenging, but leading a school can be extraordinarily difficult. Conflicting demands are made on Heads of Schools by the parents, the students, the trustees, the faculty, and the alumni. In trying to be receptive to all, many Heads find it difficult to say no. Some Heads know an unpopular decision is required but do not have the energy to cope with the inevitable complaints. Instead, they hope that the issue will resolve itself or disappear. One has to be somewhat thick-skinned to be a successful Head; more importantly, one has to be courageous and possess considerable depth of character.
- **The four I's: intelligence, initiative, integrity, and interpersonal skills.** While the Head does not have to be the most talented educator in the school, s/he must respect the life of the mind and be able to participate in the school's academic debates. A powerful intellect is not essential – but it helps.

No Board of Trustees wants a Head to pursue every idea in knee-jerk fashion. Still, the institutional leader must take the initiative to pursue programs, projects, and policy changes that will contribute to the development of the institution. The Head cannot wait to be told by the Board what needs to be done.

Integrity is essential. Great leaders inspire trust and they trust others.

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**Unfortunately, there is no simple test to measure integrity. Fortunately, the probing reference interviews we conduct with supervisors, peers, and subordinates of the candidates work quite well in uncovering evidence of fundamental character traits.**

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Leaders also must have the ability to relate well to all kinds of people. While no one can be expected to interact equally effectively with trustees, parents, faculty, alumni, staff, and students, Heads who are not at least moderately successful with each of these groups will soon find themselves criticized as insensitive, arrogant, uncaring, or incompetent.

- **Communication Skills.** Most educators assume that they are effective speakers, but being able to explain something to students four different ways is not the same as being an effective public speaker. And effective communication with a variety of constituencies is critically important.

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**We encourage candidates to submit recent examples of their writing in part to uncover tendencies toward doublespeak or the inability to organize thoughts coherently.**

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More than one candidate has been eliminated from consideration because of an awkward and pedantic writing style. Academicians are often trained to state in 20 words what others would say in five. Words and phrases that are specific to a given discipline or subspecialty are used with alarming frequency, confusing rather than enlightening those (including most search committee members) who are educated in other fields. A school's credibility as a place of learning is surely enhanced by a Head who writes in a lucid and distinguished style.

**SELECTING YOUR  
SEMIFINALISTS:  
THE CREDENTIAL  
REVIEW**

We generally suggest that you allow about three hours for the meeting at which you will select your semifinalists. Wickenden Associates will be present to facilitate that process and to answer your questions about the candidates we have presented. Search

Committee members can help to expedite the process by reviewing the candidate credentials in advance and completing the ballot included in the credentials notebook.

Typically, we suggest that you begin the meeting with a quick straw vote to identify candidates who have strong support among the committee and those who have very little support. The meeting then can focus on the candidates “on the bubble” – those about whom opinions are most divided or about whom members are most uncertain, but who still could end up being strong candidates.

This is the time to remember that you are seeking a “goodness of fit” between institution and candidate. Different types of individuals are appropriate for institutions at different stages of their development. A person with a successful history of starting schools might not be a wise choice for an institution that is seeking only to refine an already solid program. Similarly, a person whose force of personality contributed to a successful turnaround might not be appropriate for or might have a difficult time in an institution where much of the governance power resides with the faculty.

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**Search Committee members who have never been responsible for hiring may be overly conservative during this phase of the process, gravitating only to those who have held or are holding headships. Overlooking non-Heads who exhibit energy, enthusiasm, promise, intelligence, and vision could prove to be a major mistake.**

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By the conclusion of the review process, the committee should have identified approximately six to eight semifinalists, each of whom will be invited for a 90-minute interview. The committee may also wish to identify a few candidates to be put on hold, in case some of the candidates decide to withdraw at this or a later stage. Wickenden Associates will notify the rest of the candidates that they are no longer under consideration.

At the conclusion of the Credential Review meeting – or at a separate meeting to be held within the next week or so – the Search Committee should plan to take a few moments to talk about the organization of the interviews and the role each member will play in the questioning of candidates. More information about that aspect of the process is included in the next section.

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### **Additional Resources and Tools on our "Client Resources" page:**

- ✓ [Preparing for the Semifinalist Interviews: A Checklist for the Search Committee Chair](#)

(To view or print all resource documents, visit our website at [www.wickenden.com](http://www.wickenden.com).)



# Phase 4: Auditioning the Candidates

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## Key facets of this phase:

- ✓ Interviewing the Semifinalists
- ✓ Selecting the Finalists
- ✓ Planning and Carrying Out the Finalist Visits
- ✓ Evaluating the Finalists
- ✓ Collecting Compensation Information

At this critical point in the search process, the Search Committee must be oriented to wooing as well as evaluating candidates. This is the time when you will be auditioning your best prospects – evaluating how they perform in a variety of settings and with different constituencies. It is also the time when your best prospects will be evaluating you – the appeal of the school’s challenges and opportunities, the warmth of the community, and the quality of life this position might provide for them and their families.

## Planning the Semifinalist Interviews

Wickenden Associates will immediately inform the semifinalists of their selection and work with them to schedule their interviews. We will coordinate with your designated contact person both the preparation of the interview schedule and the travel arrangements for the candidates. We will also ensure that the semifinalists receive any additional material about the school that might be appropriate at this point: a strategic plan, capital campaign material, recent school magazines or bulletins, or information about your city or region provided by the chamber of commerce or a local tourism agency.

Semifinalist interviews are customarily scheduled for a weekend because that is when candidates are better able to leave their schools without inviting questions, and Search Committee members can avoid missing work time.

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**Wickenden Associates will attend the entire weekend of interviews, both to facilitate the introductions of candidates and to guide the committee through the selection of finalists.**

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Allow approximately 90 minutes for each interview, with 15-minute breaks in between. Occasionally, the interviews are held off campus (but near the school) to protect the

confidentiality of the candidates. If there are more than eight semifinalists, we recommend that the interviews start on Friday. If possible, try to schedule no more than three or four candidates for Sunday, as the committee will need time at the conclusion of the interviewing process to discuss the candidates and choose the finalists. Arrangements should be made in advance to have lunch brought in each day; allow about an hour for the lunch break.

Most candidates will appreciate a school tour, which should immediately precede or follow the interview. Other trustees or advisory committee members are often available and eager to conduct the tours. Be aware, though, that these guides should be selected wisely and with the understanding that they will respect the importance of maintaining the confidentiality of the candidates and the process.

### INTERVIEW TIPS

A large conference table provides a comfortable setting for the interviews, with the candidate seated at the head of the table. Nametags or nameplates for each committee member will be appreciated by the candidates, as will a bottle of water.

As the first opportunity for the candidate and committee to interact, the semifinalist interview should be designed to be informational rather than confrontational. The best conversations tend to occur when the Search Committee makes the candidate feel welcome and at ease.

Some suggestions for getting the interview started on a friendly note:

- Ask all Search Committee members to introduce themselves and briefly describe their connection to the school.
- Begin with an open-ended and non-threatening question, e.g., "Tell us about yourself and why this particular opportunity has captured your interest."
- Continue with a question from a subject area in which the candidate has demonstrated solid experience.

Because you want to focus on what a candidate can bring to the job, the questioning should be directed toward learning what the person has achieved more than toward hypothetical issues. The quick-witted, interview-savvy, or experienced leader may do well with the theoretical, but might not be appropriate for the job if s/he cannot provide evidence of an ability to deal with the specific challenges that will face the new Head. The most enlightening responses often emerge from questions that ask for specific examples or anecdotes drawn from the candidate's own experiences. To obtain the most value from the interviews, consider the specific challenges facing your school when formulating questions (though you should not expect the candidates to know how they would deal with each challenge your school is facing).

To ensure that the interviews unfold as successfully as possible, the Search Committee should:

- Decide in advance whether the committee will ask questions in a predetermined order or proceed with a more conversational, ad hoc approach.
- Assign a specific area of questioning to each member.

- Designate one member to ask each semifinalist a question that is candidate-specific, i.e., one that demonstrates that the committee has carefully read the candidate's materials.
- Assume that each Search Committee member will have time for a maximum of two questions (perhaps only one if the committee is large).
- Allow about 15 minutes at the conclusion of the interview for the candidate to ask any questions s/he might have.

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**Most committee members will want to take good notes during the interviews or designate a committee scribe. By the end of this long and intensive weekend, you will appreciate anything that will help you to recall the candidates and your reactions to them!**

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The sample questions that follow are presented as a menu from which Search Committee members may select the questions most appropriate to the school's particular circumstances. Some of these questions are best suited to candidates with prior Head experience, while others will work particularly well with aspiring Heads. Schools with a particular religious affiliation or educational philosophy may want to tailor their question selection accordingly. Choosing carefully from the menu – adding or adapting when necessary – will yield the best results.

### Sample Questions for the Semifinalist Interviews

#### MANAGEMENT AND LEADERSHIP

1. Identify three or four essential aspects of your current position. Tell us the parts of the job you like best and at which you are best.
2. Tell us about your current school — its ethos and culture. Describe a typical day in your current position.
3. Describe your decision-making style, using examples of some good and bad decisions you have made. How about an unpopular decision? How did you deal with the response to it?
4. We are working toward a better academic integration and working relationship among the divisions of the school. How might you contribute to this process? Has this been an issue at your school and, if so, how have you contributed to improving the situation?
5. Describe the type of organizational and governance structure at your current school. How many direct reports do you have? How often do you meet?
6. Have you been involved in the preparation of strategic plans? Describe these experiences and their results.
7. In your present position, is it your responsibility to evaluate others' performance? Describe how you do that.

8. Describe the nature of your communication with the Board, faculty, and staff. What means of communication do you use, and how often are you in touch?
9. Describe a meaningful institutional change for which you had primary responsibility and tell us how you went about effecting that change. What have been the outcomes of that change?
10. In what ways, if any, have you been involved with admissions and enrollment management in your current position?
11. In what ways have you been part of a marketing effort at your school? What has been your experience with being the public face of a school?
12. In your philosophy of education statement, you said, “[insert quotation here].” Can you expand on that idea?
13. What do you see as the major challenges ahead for independent education in the U.S.? For education in general?
14. What is your vision of the type of school you would like to lead?
15. *(For single-sex institutions)* What do you see as the advantages of single-sex education? Are there disadvantages? If so, how can they best be overcome?
16. *(For schools with a particular religious affiliation)* What do you see as the challenges and opportunities associated with integrating the academic and religious aspects of our mission?
17. Describe your experience in curriculum development. What are your guiding principles or influences?
18. What is your philosophy regarding the use of technology in the educational program?
19. What innovative uses of technology have you experienced at your school? How would you describe the role of technology in your school and in the classroom? How is the faculty encouraged to integrate new technology?
20. How does your school balance the inevitable tensions that exist among academics, athletics, the arts, community service, and extracurricular activities?
21. What structures does your school have in place to address the stress and pressure that students are experiencing? How have you worked to care for the whole child?
22. How would you describe the range of learners in your student population? How does your school differentiate instruction?
23. What structures are in place at your school to support students with academic challenges?
24. How would you characterize the college placement process at your school? How do you evaluate the success of your program?
25. What are the main topics of conversation or controversy among your faculty now regarding the educational program? What are your views on those issues?

**EDUCATIONAL  
PHILOSOPHY**

**DIVERSITY AND GLOBALISM**

26. How do you define diversity and what do you feel it brings to your school? What would the ideal diverse school community look like?
27. What obstacles have you faced in diversity initiatives and how do you define a successful outcome?
28. What challenges have you encountered in recruiting a diverse faculty and/or student body and how have you attempted to overcome them?
29. How has your school's interest in diversity been reflected in the educational program?
30. What global initiatives have been undertaken at your school and how have you participated in them?

**STUDENT AND FAMILY RELATIONS**

31. How would you get to know the students in all divisions of the school? What has been your experience in this area?
32. How do you communicate with families?
33. What do you see as the parents' role in the school? What is the appropriate relationship between school and home? How do you go about setting boundaries?
34. What experience have you had with disciplining students?
35. How have you dealt with difficult and demanding parents?

**BOARD RELATIONS**

36. Tell us about your experience working with Boards.
37. What do you consider the ideal relationship between the Head of School and the Board of Trustees? What steps would you take to help establish such a relationship?

**FACULTY AND STAFF RELATIONS**

38. Discuss your experience in hiring administrators, faculty, or staff. What significant things do you look for when making hiring decisions?
39. Have you ever been involved in developing and implementing a faculty evaluation/development program? If so, was it effective? What were its shortcomings? What suggestions would you offer a school in the process of developing such a program?
40. Within your current faculty evaluation system, tell us how you would handle a long-tenured but weak teacher. How about an inexperienced teacher with great potential but uneven skills? How do you reward particularly outstanding teachers?
41. Have you ever had to fire anyone? If so, how did you handle the situation? What steps would you take in deciding whether a staff or faculty member should be terminated?

**FINANCE AND  
FUNDRAISING**

42. What opportunities for professional development exist at your school?
43. How do you keep your faculty and staff energized and motivated?
44. What experience and responsibility have you had in the preparation and implementation of operating and capital budgets?
45. What do you see as the greatest threats to financial sustainability in independent schools? How would you propose to respond to those threats?
46. To what extent have you been involved in fundraising? Do you feel comfortable asking people for money? Overall, what do you see as the nature of the Head's role in fundraising?
47. If you were unexpectedly handed an unrestricted dollar amount (\$5 million? \$10 million?) and were not permitted to use it to pay down debt, how would you go about determining where you would invest it in the school?

**PROFESSIONAL  
ACHIEVEMENTS**

48. What do you consider your most important accomplishment to date in your career and why? How did you achieve it?
49. Describe some initiatives in your school for which you believe you have been responsible.
50. Describe some of the major school problems or stressful situations you have had to deal with, discuss how you handled them, and tell us what you learned.
51. What do you hope to accomplish professionally in the next five to 10 years?

**PERSONAL  
CHARACTERISTICS  
AND GOALS**

52. Why this change in your career now? What attracts you to this particular job?
53. Tell us how you have grown and changed as a person over the past 10 years.
54. What would your critics say are your shortcomings? Do you agree? How do you work to overcome them?
55. How do you keep yourself energized?
56. What are you reading now?
57. How would living here be different from your current location?
58. How would you go about becoming involved in this community?
59. What two or three things do you enjoy most in your current position? What are your two or three biggest headaches? What keeps you up at night?
60. What or whom do you believe has been most influential in shaping your values?

## Selecting the Finalists

At the conclusion of the semifinalist interviews, Wickenden Associates will facilitate the process by which you select a small group of finalists – typically three or four. As in the Credential Review round, you may want to hold in abeyance one or two semifinalists who might be made finalists if one of your initial choices declines to move forward in the process.

## Planning the Finalist Visits

The selection by the Search Committee of the finalists marks an important turning point in the search process. As the committee narrows its focus to a few strong candidates, it must simultaneously broaden its efforts to bring representatives of all school constituencies into the process. Many members of the school community will be meeting and evaluating the candidates. And just as faculty, staff, parents, alumni, and students will be forming opinions about the visitors, the finalists themselves will be gathering impressions about the school and the job opportunity on the basis of a whirlwind of meetings, interviews, and receptions.

At this stage of the process, it is best to move quickly so that there is not a long interval between the visits of the first and last finalists. Strong candidates are quite likely to have other offers at this point.

The Search Committee that pays close attention to keeping the lines of communication open and the interview process running smoothly can spare itself a host of headaches later on. Specifically, at this stage of the process, the committee should:

- Place calls to those selected to return as finalists and welcome them to the process.
- Decide who (Wickenden Associates or a Search Committee representative) will notify semifinalists who were not selected and ensure that they are informed promptly.
- Establish schedules for the visit of each finalist to the school and line up members of the committee and broader school community to act as guides and hosts for both the finalist and the spouse. It is helpful to ask each finalist if his or her spouse has a particular interest or need that might be addressed during the visit (e.g. employment opportunities, educational options for children, housing possibilities).
- Determine what additional information about the school will be sent to finalists and get it into their hands as soon as possible. (Include audited financial statements, any existing long-range plan, the most recent accreditation report, enrollment statistics, college placement data, samples of school newsletters, faculty and student handbooks, development data, etc. – in short, anything that helps to illuminate the school's present condition and challenges.)
- Bring the full Board of Trustees up to date on the progress of the search, describing what the committee has learned about the school as a result of the process. If the Board has not yet completed work on the Charge to the Head, it

should do so now. Finalists are almost certain to ask what would be expected of them during the first few years of their tenure. The Board should also begin to direct its attention to developing an evaluation process for the new Head of School if it does not already have one in place.

- Prepare and send a communication to the school community to bring them up to date on the progress made so far and the expected timetable for the remainder of the search.

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**We strongly recommend, however, that you do not announce the names of the finalists in this communication or post their names on the school website, as some candidates may wish to keep their candidacy confidential as long as possible. Those members of the school community who will interview finalists should be provided with a copy or summary of each finalist's résumé the day before that candidate's visit.**

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### FINALISTS' VISITS TO THE SCHOOL

The visit of each finalist to the school — usually for two days of meetings, receptions, and interviews — serves three vital purposes:

- It allows the Search Committee an extended observation of the candidate in various settings within the school.
- It provides the school constituencies an opportunity to become involved in the process and to contribute their unique insights.
- It provides the entire school community with a chance to sell the finalists on the opportunity that will await the successful candidate.

Careful attention should be paid to ensuring that all three of these objectives are met during the visit. All parties should be given every opportunity to present themselves well. And to the extent possible, candidates should be protected from disgruntled or single-issue types who are unlikely to offer objective evaluations and who, in the worst case, could prompt a solid candidate to withdraw.

Candidates should be invited to bring their spouses, and special efforts should be made to make partners feel welcome and to provide them with information about the expectations, obligations (if any), and opportunities that await the Head's partner. Usually, the spouse or partner is given a tour of the school and the area while the candidate attends a series of interviews. The partner can then join the candidate late in the day for a reception, dinner, and perhaps a group meeting with alumni or parents.

The Search Committee should recognize that the process of making the rounds of an entire school community in two days can be a grueling experience. Opportunities for rest and private reflection should be built into the schedule. For the same reason, it is usually best to arrange hotel accommodations for the candidates rather than inviting

them to stay in the home of someone affiliated with the school. As a courtesy to the candidate, interviewers and guides should wear nametags. And to prevent the candidate from falling behind schedule (and risk appearing rude to waiting interviewers), someone should be specifically charged with the responsibility of ending each session on time and moving the candidate along to the next appointment.

The list of selected interviewers will vary depending upon the hierarchy within the school. In general, though, appointments of roughly 45 minutes with individuals and an hour to 90 minutes for groups should be scheduled with the following:

- Head or Interim Head
- Departmental Chairpersons
- College Counselor
- Business Manager
- Director of Development
- Dean of Students
- Director of Athletics
- Director of Admissions
- Chaplain
- Division Heads
- Selected Group of Faculty
- Selected Group of Students
- Selected Group of Parents
- Alumni Council

The Search Committee should plan to have dinner with each finalist and spouse, probably on the first night of the two-day visit. The candidate and his or her partner should also be given the opportunity – probably in a social setting – to meet with the Board President and other trustees who are not on the Search Committee. One format that has worked well at some schools is a reception prior to the dinner with the Search Committee.

Everyone on the appointment schedule should be reminded to view themselves as both collectors *and providers* of information and impressions. All should recognize that they have an important role to play in presenting the school – and the job opportunity – in a forthright and positive way. Advisory groups should be reminded, tactfully, that they are not Search Committee members and are not being asked to *vote* for a particular candidate. Although interviewers will likely receive the finalists' résumés as background information for the interview, they should be advised that their role is to comment on their impressions of each finalist, *not to evaluate their paper credentials*.

### **COLLECTING EVALUATION INFORMATION**

To expedite the collection and analysis of evaluations from everyone who meets with the finalists, Wickenden Associates offers an online form. The Search Committee provides all interviewers with a link to the form and a deadline for completing the evaluations.

(View a sample form at <https://www.surveymonkey.com/r/samplefinalistevalform>); we will work with you to adapt the form to your particular requirements.)

When all of the visits have been completed and the deadline has passed, we will send you a summary of the results, a comparison of the candidate evaluations, and a transcript of all responses to the open-ended questions for each finalist.

A word of warning: Asking any constituency group (faculty, parents, or students) to present their impressions *collectively* can be an invitation to disaster! Once such a group has met and taken a “vote” on the candidate, its opinion can take on a life of its own. The Search Committee should avoid placing itself in a situation where it wishes to recommend a particular candidate to the Board, but finds its hands tied by the political complication of a single constituency’s consensus in favor of another.

Instead, collect the opinions of faculty, students, and parents individually – ideally via our web-based instrument, which permits a rapid compilation and analysis of the results. This procedure will give the Search Committee a far clearer understanding of the range of opinion within those groups and preserve the committee’s appropriate role as the decision-maker with regard to which candidate will be recommended to the Board.

## Reference Checking

While the Search Committee is planning and carrying out the visits of the finalists, Wickenden Associates will be completing the reference checking process. We routinely complete five reference checks for each finalist, adding more if necessary to explore any issues that surface. We contact references who are included on the candidate's list and additional off-list individuals whom we typically determine by their professional relationship with the candidate. We encourage Search Committee members to let us know if there are particular issues or questions you would like us to pursue during our reference interviews.

Search committees sometimes find it difficult to evaluate candidates accurately on the intangibles of school leadership – traits and abilities that are particularly difficult to gauge in an interview setting. These include:

- Vision.
- Leadership style and ability to lead: persuasiveness, willingness to collaborate and yet accept responsibility, decisiveness, and openness to criticism.
- Emotional resilience (optimism, stability, patience).
- Ability to plan and stay the course without overreacting to events.
- Interest in and effectiveness with students.
- Willingness to work hard and persevere.

Fortunately, our reference-checking process excels at illuminating candidates' performance in all of these and other areas.

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**It is through extensive reference checking that the candidate's strengths and personality are illuminated. A single reference is like a snapshot, providing one person's view in the context of one kind of relationship. But a careful reading of a collection of references is a wholly different matter: Patterns begin to emerge; comments from one person reinforce or clarify the comments of another; and strengths and weaknesses appear in clear relief.**

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In evaluating these reference reports, it is important to keep in mind that evidence of controversy or an occasional mistake should not necessarily disqualify a candidate. Successful administrators often make difficult and controversial decisions; a person with no record of controversy or error might be a person unwilling to take risks or one who has not yet been called upon to make difficult decisions.

**THE  
COMMITTEE'S  
ROLE IN  
REFERENCE  
CHECKING**

While Wickenden Associates is confident of its ability to do a thorough job of reference checking, we encourage members of the Search Committee to join us in this aspect of the search process, particularly if they have contacts in a finalist's school or community. Conversations between peers — teacher to teacher, Board Chair to Board Chair — often yield valuable insights because of the shared bond. And information collected firsthand can sometimes have a greater impact on a committee member. As a courtesy to the candidate, we suggest you inform him or her about whom you plan to call.

It is important, however, that the Chair of the Search Committee or a designee coordinate these reference calls to avoid duplication. If members of the committee wish to follow up with calls to people already contacted by Wickenden Associates, they should first read our reports. The purpose of a follow-up call should be to ask the reference to clarify or elaborate upon a point, or to discuss an issue that was not touched upon in the initial conversation. The reference should not be asked to repeat all the information s/he has already provided to Wickenden Associates.

Not all reference sources are equally capable of providing or even willing to offer balanced appraisals of the candidate. But nearly everyone can be drawn out through careful questioning in a relaxed telephone conversation. Here are some tips for making the most of a reference check:

- Many people are caught off guard by a phone call in which they are asked to evaluate a colleague. Begin the conversation by confirming what you already know about the candidate with general, non-threatening questions. Usually, it's helpful to ask how long and in what capacity the source has known the candidate, as well as the nature of their work together. Asking about strengths and accomplishments before inquiring about potential negatives will also help to generate a balanced report.
- To overcome the understandable reluctance many people have about offering negative comments, try asking, "What would his critics say about him?" or "What problems has she encountered at your school?" Often, this simple technique of shifting the conversation away from a source's opinions and toward observations will elicit valuable information. Keep in mind, however, that the purpose of the call is to obtain a balanced view, not simply to smoke out negative comments.
- Ask for anecdotes or examples to illustrate what the source is trying to convey. These brief glimpses into a candidate's behavior in a specific situation can be quite enlightening.

Finally, don't rely on your memory. Take extensive notes and, as soon as possible after your conversation, record them in a memo to the rest of the Search Committee. To enhance the reliability of your report, use the source's own words whenever you can.

## **Other Evaluation Tools**

We'd like to offer some thoughts about two evaluation techniques that we do not generally recommend, but about which search committees sometimes inquire.

### **The Site Visit**

For a time many years ago, it became fashionable for independent school search committees to schedule a site visit to the schools of one or more finalist candidates as a final step in the vetting process. The practice became increasingly controversial as well-respected Heads began to object to what they viewed as an intrusive and inappropriate imposition on the host school community. The concern was great enough that NAIS included a reference to the sensitivity of such visits in its **Principles of Good Practice for Search Committees** (*reprinted on page 7 of this manual*). Generally, we share those concerns; after all, very few professions permit prospective employers the opportunity to visit a candidate's present employment site in search of information. So, while we do not recommend site visits, we want to provide some information should you decide to conduct one.

A visit to the school of the candidate who has been identified as the probable first choice of the committee can be undertaken as a final stage in the research process in certain circumstances. For example, if reference checks turn up strongly contradictory opinions about a candidate's strength or weakness in a particular area, a site visit might help clarify the reason for the discrepancy. If the committee is having a difficult time deciding between two exceptionally strong candidates, site visits might tip the balance in favor of one or the other.

The site visit should never be used as a substitute for extensive and thorough reference checking. The visit might bring additional insights, but should not turn up any major surprises. A site visit is probably most useful when the finalist is a sitting Head; with administrators below the Head level, it can be difficult to sort out how much of the tone and condition of the school can be fairly attributed to the administrator you are trying to evaluate.

The visiting team should include no more than two or three people, one of whom should be a faculty member if at all possible. The faculty member can collect a great deal of useful information from his or her peers and can later help to sell the teaching staff on the qualities of the successful candidate.

Search committees must always be aware that the public nature of their visit constitutes a risk for the candidate, whose relationships with colleagues might be jeopardized if no job offer is extended. Thus, the committee should go to great lengths to avoid undue disruption to the host school or to the candidate's standing at the school. The following guidelines should always be observed:

- The committee should first seek the permission of the candidate to visit the school. A candidate's refusal to allow such a visit should not automatically disqualify him or her from further consideration; the candidate's reasons for vetoing the visit should be respected and other ways of obtaining the desired information explored if necessary.

- The committee should determine what specific issues and concerns about the candidate will be addressed during the site visit. It should then decide which persons at the host school are best qualified to address them. For example, if there were concerns that the candidate might be too autocratic, it would make sense for the committee to speak with department heads. The candidate should not be allowed to specify which department heads the visiting team will meet; a random selection by the committee is more apt to produce objective and balanced reports. Others who might be on the list, depending upon the concerns, are the Board Chair and other trustees, the Dean of the Faculty, Division Heads, the Assistant Head, and the Business Manager.

After the site visit, the visiting team should report its conclusions to the entire Search Committee, preferably in writing. The candidate also deserves the courtesy of being told in general terms what insights were gained as a result of the visit.

### **Psychological Testing**

As the use of pre-employment testing has become increasingly pervasive in many fields, we are hearing more inquiries from search committees about the possibility of using a standardized psychological instrument with finalists. We are skeptical about the value of this technique, in part because there is no test at this time that has been normed for independent school Heads. Furthermore, we have unfortunately witnessed a couple of disastrous attempts by human resources professionals – from industries markedly different from schools – to impose upon the process an instrument with which they were familiar.

We understand the potential value of standardized assessments in situations where hiring professionals do not have the benefit of extensive reference checking and multiple opportunities to evaluate candidates in interview settings. At this time, we remain unconvinced of its value in our process. We are, however, consulting with experts in this field and exploring the suitability of an instrument for future use. If members of the Search Committee feel strongly about the importance of such testing, we would be happy to discuss this approach with you in more detail.

### **Compensation Information**

Wickenden Associates will collect details from each finalist about their current compensation package and transmit this information to the Search Chair. We can also provide you with data about Head of School salaries for comparable schools.

While any final offer to a candidate will need to wait until the finalists' visits have concluded, it is not too early for the Search Chair to open a dialogue with potential appointees about their compensation expectations and any particular issues they might have regarding potential benefits such as housing, loan forgiveness, tuition remission, etc.

The Search Committee will want to be in a position to move quickly with an attractive offer once a decision has been made.

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**Additional Resources and Tools on our "Client Resources" page:**

- ✓ The Finalist Interviews: A Checklist for the Search Committee Chair
- ✓ Sample Finalist Interview Schedule

(To view or print all resource documents, visit our website at [www.wickenden.com](http://www.wickenden.com).)



## Phase 5: Closing the Deal

### Key facets of this phase:

- ✓ Reviewing Finalist Evaluations and References
- ✓ Recommending a Candidate to the Board
- ✓ Negotiating and Finalizing the Contract

### Arriving at a Final Decision

Shortly after the last finalist visit, the Search Committee will meet to review all of the information available to you and to make a decision. In doing so, you will have the benefit of your own impressions, the candidate's materials, the evaluations of those who interviewed the finalists, and the full set of reference checks for each candidate.

We urge the Search Committee to pay particularly close attention to the references, which may well have landed in your inbox during a busy time in the process. While the constituent evaluations can exert a powerful influence because of the passion of the interviewers, it is important to bear in mind that the reference reports provide you with a much deeper and more balanced analysis of each candidate's character, leadership style, and professional accomplishments. The interviewers' evaluations, in contrast, are based upon a mere snapshot of the finalist's performance – which may have come at the end of a very long day!

Ideally, there will be a clear first choice among your finalists, and the committee will quickly reach consensus. If opinions are evenly divided, you will need to listen respectfully to one another and debate the pros and cons of the viable finalists. (A simple majority vote is not the best way to launch a new Head's tenure.) We strongly recommend that the Search Committee present one name – and only one name – to the Board of Trustees for its ratification. Time and careful consideration should be given to bringing as many Search Committee members on board and in support of a single candidate.

Prior to doing so, the Search Chair should contact the favored candidate to let that person know that the Search Committee is eager to bring his or her name to the Board. The Search Chair should inquire whether the candidate would be inclined to accept an offer from the school and address any lingering issues the candidate might raise.

As soon as the Board has ratified the committee's choice – but never before! – finalists who were not selected should be notified by the Search Chair and thanked for their participation in the process.

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## The Employment Agreement

Once the Search Committee has reached agreement on its choice for a new Head of School and that choice has been ratified by the full Board of Trustees, the Search Chair and the President of the Board must complete the process by making a formal offer to the candidate. In addition to salary, the Board representatives should be prepared to discuss with the candidate a variety of other issues related to compensation and the Board's expectations of the Head.

Although not all schools use contracts, most now do. The contract can be a lengthy formal document prepared by an attorney or a less elaborate letter of understanding co-signed by the new Head and the President of the Board. In some cases, the parties sign a Letter of Intent to serve until the final contract can be completed.

In addition to specifying the usual details of the employer-employee relationship (salary, benefits, etc.), the contract can be used as another tool to make clear to all parties the Board's expectations of the Head and its view of its own responsibilities and prerogatives. The employment agreement should be designed to reward the Head for behaviors directed toward the achievement of the school's goals. If carefully prepared, such a document can help to set the tone for the relationship between the Board and the Head and provide a basis for communication and understanding between the parties.

The Board should also be aware that creative compensation and benefits packages have become one of the prime means by which independent schools attract and retain valuable employees. And schools – which by their very nature are oriented to the values of family and education – need to be particularly sensitive to the importance of reflecting a commitment to those values in the employment agreement. Schools can demonstrate this commitment by providing tuition benefits for children, employment assistance for the spouse, continuing education funds for the Head, and adequate vacation time to permit the Head to fulfill family obligations.

While Wickenden Associates takes care to avoid conflict of interest issues associated with advising you on an appropriate cash salary, we are happy to share sample contract provisions and our knowledge about the ways in which independent schools structure contracts to achieve desired outcomes.

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### Additional Resources and Tools on our "Client Resources" page:

- ✓ [Sample Contract Letter](#)
- ✓ [Sample Letter of Intent](#)

(To view or print all resource documents, visit our website at [www.wickenden.com](http://www.wickenden.com).)



# After the Appointment: The Transition Begins

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## Key facets of this phase:

- ✓ Communicating the Appointment
- ✓ Debriefing the Board
- ✓ Activating the Transition Committee

The appointment of the Head of School marks the end of the search and the beginning of the transition. Search Committee members should feel free to pat themselves on the back, breathe a sigh of relief, and hand the baton to the Transition Committee!

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**Recognizing the vital importance of an effective transition, Wickenden Associates offers *What's Next*, a comprehensive monograph outlining a complete strategy for facilitating the Head's smooth entry.**

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The search for a new Head of School provides a window into many areas of school life. As a result, the Search Committee usually comes out of a search with a wealth of new insights about the school. Those not directly involved in the search process, for example, might not have had the opportunity to review the Opportunity Statement in great detail or to listen to the varied perspectives of the candidates on potential solutions to issues facing the school. To ensure that these insights are not lost and to minimize the development of a "we-they" feeling among the trustees, the Search Committee Chair should deliver a comprehensive report to the entire Board about what was learned during the course of the search.

As the people most familiar with the qualifications of the successful candidate, members of the Search Committee should decide how they will demonstrate their support for the new Head in the face of any resistance that might come from those who feel threatened by the leadership change or from those who supported another candidate (particularly an internal one).

Finally, as graciously and quickly as possible, the committee should cede back to the full Board – where it belongs – the job of creating and fostering a productive working relationship between Board and Head.

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## Additional Resources and Tools on our "Client Resources" page:

- ✓ [What's Next? After the Appointment, Paving the Way for your New Head's Successful Transition \(A Wickenden Associates monograph\)](#)

(To view or print all resource documents, visit our website at [www.wickenden.com](http://www.wickenden.com).)