



Search

HOME > MAGAZINE > INDEPENDENT SCHOOL > SUMMER 2022 >
WORKING TOWARD BETTER HEAD-BOARD ALIGNMENT

Working Toward Better Head-Board Alignment

Summer 2022

By Carolyn Chandler, John Gulla, and Olaf Jorgenson



Feedback

This article appeared as "Critical Syncing" in the Summer 2022 issue of Independent School.

As in gymnastics, bull riding, and bicycle racing, when independent school leaders make an unscheduled dismount, leaving their positions suddenly—what NAIS research refers to as an “unplanned transition”—the result can be painful and costly to the head and the school community. And as NAIS data indicate, these unplanned transitions have been trending upward since 2012.

Why is this? Heads of school today are “making unprecedented difficult decisions in an increasingly complex time,” writes Margaret Anne Rowe in [a March 2021 *Independent Ideas* blog post](#). The national reckoning on racial justice, the sustained emotion and anxiety of a global pandemic, and the explosive volatility of social media are just some of the factors adding to the complexity and stress of the head’s job.

When this increasingly challenging nature of the role is put in the context of the growing number of heads abruptly leaving their positions, the outlook for headship warrants attention. According to NAIS’s 2020 “[Head Turnover at Independent Schools: Sustaining School Leadership](#)” report, as many as 20% of new heads leave their jobs after three years or less, while a stunning 42% of heads have reported a “strained” relationship with their board over the past decade.

Now more than ever, the modern headship depends on a harmonious head-board alignment. But why is it so often elusive? What are the specific misalignments between heads and boards that lead to unplanned transitions—and how can schools prevent them?

Although schools and search processes are unique and experiences vary widely, there are clear

patterns in what goes awry—and what can be done to remedy the issues in play. In our collective experience as heads and in the conversations we've had with more than a dozen sitting and former heads, search consultants, and board chairs, we've found that there are steps boards can take to make the head selection process as effective and fruitful as possible, to support healthy headships, and to set the relationship on a course in which unplanned transitions are less likely to occur.

Wants vs. Needs

The problems often begin at the very beginning: before the search process and hiring of a new head. And they are often the result of heads' *and* boards' unrealistic expectations—and a clash between what trustees think they want in a head and what they actually need. One search consultant we talked to said that most search committee members have an idealized vision of a school's next head long before they ever meet the first candidate.

It is a truth universally acknowledged that independent school boards have no more important task than hiring—and then supporting and evaluating—the school's head. So what do boards look for in a head? What do board search committees want? “God—on a good day,” as the long-standing joke in the independent school community goes.

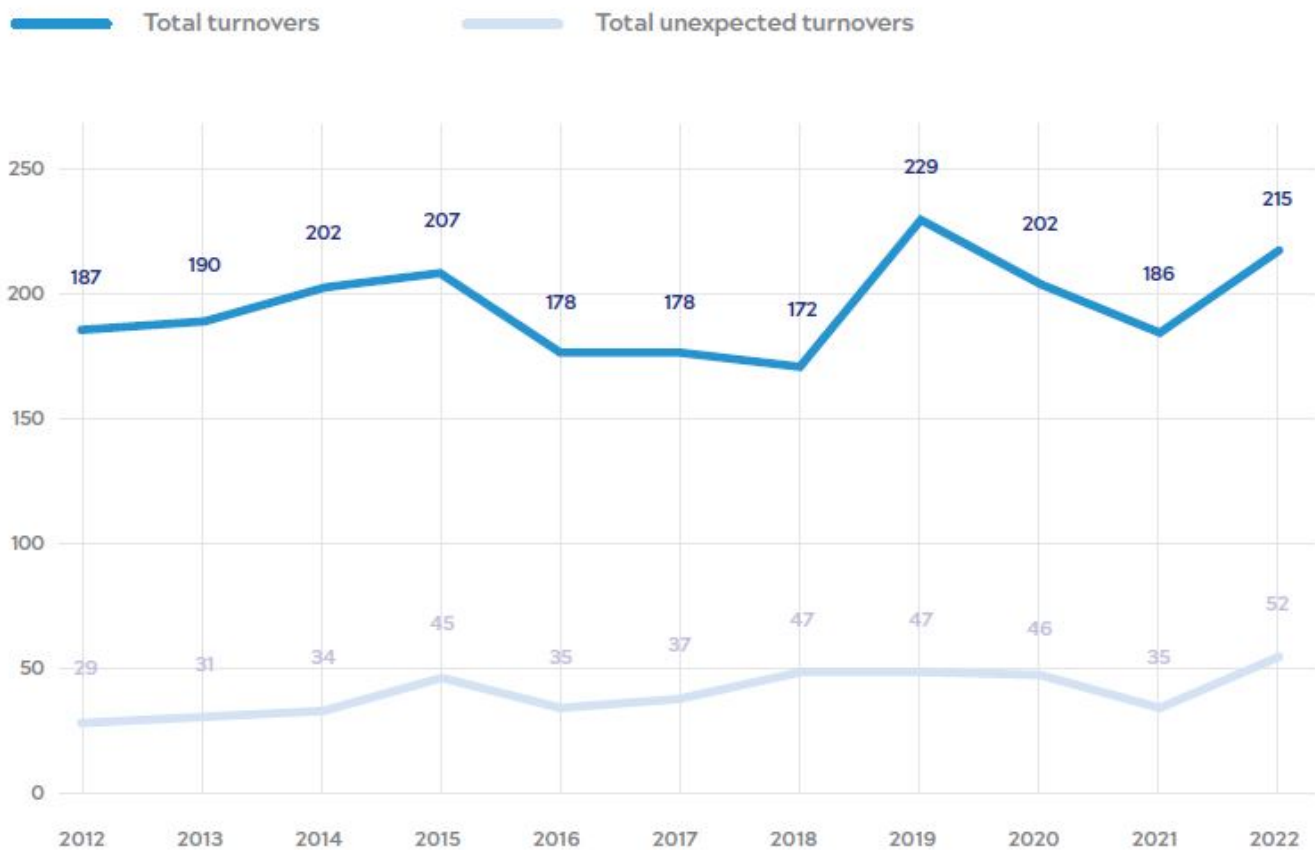
Presuming God is not available, search committees and boards often seek to address whatever skills, qualities, or competencies had not been present in the outgoing head. Schools that are pleased with the outgoing head may look to replicate that model of leadership, but those facing specific challenges, such as a decline in enrollment or in fundraising support, might seek requisite skills they hope to identify in the next leader. Many others simply want a “pendulum swing.”

Feedback

But the board must focus much more on what the school *needs* than on what they *want* in the next head. Effective boards take the long view. Boards should operate like owners, not renters, focusing on the long-term needs of the school and worrying less about how any one candidate might be received by their colleagues and friends when the announcement is made. The board—despite the limited terms each member might serve—must consider the kind of school they want for generations of students to come. In the same way, good heads are leading not for today, this year, or even this decade but for the open-ended future of the school.

While there are bound to be exceptions, boards shouldn't be too specific on a single objective or two, such as “We need a head who can juice enrollment, raise more money, evaluate faculty” and so forth. That is inescapably a short-term approach. Rather, the board and the search committee should keep more overarching questions in mind, including these: *Is there a framework to be used in the search? How will the committee evaluate the talents they hope for in the next head? How will committee members avoid being unduly influenced by candidates they might like personally or those whose energy and enthusiasm might not translate into effective leadership?*

Head of School Turnover



Feedback

SOURCE: NAIS DASL

Critical Board Work

Search consultants can play a vital role in helping boards align their interests with those of prospective leaders, but appointing the search committee should not be the board's first step. Nor should choosing a search firm. The board as a whole must first undertake significant preliminary work:

Surface any divisions on the board, perhaps by using confidential surveys, and then work assiduously to come to consensus. A new head faces an uphill battle if the board itself is divided.

- Keep the school's mission at the forefront. What is the board's vision for the school, and how does that vision build on the mission? Does the school need a change agent or a leader who will help the school continue on its present trajectory? A thought leader or a relationship builder?
- Consider the history of the school. Where is the school in its maturation cycle? Young, adolescent, young adult, mature? Does it require a full reset? What kind of candidate will be

best equipped to move the school into its next phase?

- Carefully explore the idea of an in-house candidate, recognizing significant pros and cons and the promise of internal candidates who may be overlooked. Consider identifying a talented leader who already knows, and is known by, the school community, and reach out to cultivate that person's candidacy.
- Don't place limitations on the list of requirements you want in the next head. Hiring an experienced head is often at the top of everyone's list, yet much can be said for promising people who can bring fresh ideas and more contemporary perspectives, unthwarted idealism, and new energy. Given the rapid pace of change in our world, committees will want to prioritize candidates with strong motivation and the ability to learn.
- Beware of the person who is "just dying to become a head of school—any school." Instead, look for candidates with a strong moral compass who know and can make a compelling case for why they want to lead your school and what they are looking for when undertaking this work.
- Look for and examine implicit bias within the board, leveraging the search firm's expertise and perhaps a survey tool. The diversity of school heads has increased in recent years, and that trend needs to continue. Keep an open mind in considering a wide range of candidates.
- Ensure that all board members understand that they must be honest and forthcoming with finalists throughout the process. Overselling the school without surfacing pressing schoolwide issues damages credibility and the head-board relationship, imperiling alignment moving forward.

Feedback

Only when the board completes this work is it ready to form the search committee, which should include members of different backgrounds, races, constituencies, and socioeconomic levels—a more diverse search committee will ask a broader and more original range of questions. In addition, the committee chair should be someone who can consistently place the school's needs ahead of personal concerns. The chair should also be someone who will work toward establishing the necessary psychological safety to ensure that all views can be fully aired within the committee.

Engaging with Consultants

The most effective searches focus on securing a head-board partnership in which the head can help the board understand the head of school role, how schools work, and how best to move ahead together to achieve the shared vision; and the board can guide, support, counsel, and evaluate the head in a thoughtful, ongoing way that includes an annual written review.

With this central goal in mind, boards will find a number of reputable search firms offering similar services. To help them narrow the various options, here are some criteria to consider:

References from trusted peer schools or other contacts in the board's network

- The firm's experience in successfully placing leaders in schools with similar profiles (size, configuration, resources, challenges)

- The firm’s familiarity with regional and cultural dynamics important to the board and school
- The extent to which heads placed by each firm tend to stay where they’re placed
- The firm’s compatibility with board and school values (e.g., DEI, social justice, religious views, etc.)
- The qualifications of the specific individuals conducting the search relative to the profile and needs of the school
- The firm’s policy regarding a search guarantee and services provided after the search concludes. See “New Resource: Head of School Database” at right to learn about this new tool.

After a board retains search consultants, it may be tempting to become passive, deferring to the consultants’ expertise and experience. Search committee members, however, should be active partners with consultants by continuing to watch for potential candidates in their own spheres of influence, checking available candidate background information for themselves when the time is right, holding each other accountable for continually asking the tough questions, and being wary of falling in love with one particular candidate too fast—the most charming candidate may not have the ability to address the pressing needs of your school.

Discuss the possibility of visiting each finalist’s current school to talk with that school’s community members about the candidate and to get a sense of its particular culture and climate, a once common practice that unfortunately has fallen out of favor due to time constraints, cost, and issues of confidentiality. And ask search consultants to use competency-based screening methods, which match a candidate’s skills with the needs of the school, to ensure that the committee takes the time to really get to know each finalist. All parties need to connect the strengths and capabilities of the candidates with the challenges and opportunities of the school.

Feedback

Easing the Transition

Search committees can run into difficulty if they believe the task is to find the best candidate and get the contract signed, and then they’re done. But that’s only the end of one phase and the start of another. The important next step in the search process is for the board—a board that has done its work thoroughly and well—to present a united front when announcing its choice and to be able to confidently address any parent, alumni, or faculty concerns. Then the next phase, transition, can begin.

The months between the announcement and the new head’s first day on the job are crucially important. They require a strong transition plan and often benefit from the board establishing a formal transition committee. Transition plans should be structured to provide the incoming head with both professional and personal support, recognizing that the head-elect can be fully immersed in the work of leading only when their family is settled. The transition plan includes attention to specific needs of the head’s family, starting with housing and moving support: daycare, preschool, an introduction to the community (shopping, recreation, parents at school with children in the same grades, and more). A subset of the transition team focuses on welcoming, orienting, and supporting the first family in the critical months after the hiring decision and then maintains a level of support

and contact for at least one full school year.

Meanwhile, other members of the committee dedicate time to the new head's professional adjustments, making introductions with key members of the community (trustees, alumni, donors, longtime staff members) and anticipating the demands likely to land on the head's shoulders immediately. The transition committee helps create a buffer for the head to devote as much time as possible learning and discovering the school's cultural landscape in the first year. One effective tactic is to publish a "board's charge to the head" that will define a few specific priorities for the head that can cut down on petitions from various constituents: The head is accountable to the board, first and foremost. This also helps publicly broadcast board-head unity right out of the gate.

The transition phase is often a fragile period, and there are no second chances for first impressions. It may take two or three years—or more—before the new head sheds the descriptor "new," and this once-considered "risky" new leader is now comfortably in charge.

Heads Up

Once heads have begun their work, they must remember to consistently ask what actions they can take to better align their needs, expectations, and goals with those of their trustees. Because while it may be tempting to blame boards—and board chairs—for any fraught relations that might develop, exist, heads must examine the role they play in the conflicts and misunderstandings with their boards that can result in their own unscheduled departures.

Feedback

There are steps heads can take to preempt the sort of shaky head-board connection that could lead to an unplanned and disruptive departure. Such alignment efforts should begin during the search process itself and extend through the different stages of a head's tenure.

Prospective Heads

- A sustainable headship requires a deeper and more substantial motivation than just "making the team." Prospective heads should reflect deeply on their reasons for pursuing this rewarding yet often extremely challenging role.
- A candidate's desire to secure the job may obscure evidence of a poor fit during the search process or lead them to ignore warning signs. Prospective heads should keep a tally of concerns and red flags that emerge and then consult with an experienced head about them.
- A successful search requires integrity and honesty across the key players. The search committee and search consultant as well as the candidate must be open and forthright, particularly when it comes to concerns and vulnerabilities.

First-Year and Early-Career Heads

- Heads must make it a priority—and make time—to cultivate relationships with every trustee, especially the chair, starting on day one.
- First impressions matter, and a new head must make theirs as positive as possible. Heads should start year one with the goal of asking lots of questions and limiting decisions and

proclamations.

- Building trust is key, and it starts with the head-board chair team. Heads should work to build an intentional, ongoing, and honest conversation with their chair to develop confidence in one another's leadership and establish a "no secrets" practice.
- Heads are responsible for implementing agreed-upon board goals, but, at the same time, heads must educate their boards, drawing on outside resources where necessary so that trustees agree about how the head should implement sustainable change.
- Early-career heads should collaborate with their chairs to establish a sustainable pace of change and help educate the board about any new direction the head plans to take. Heads need to be sure their agenda is clear and supported by their chair, who then helps promote awareness and gain support from the board and the broader community.
- Beyond expecting the board's annual, collective, written evaluation that provides clear performance appraisal, heads should also request ongoing feedback from trustees to maintain clarity with regard to priorities and expectations.
- To help manage the demands of the job, heads must be able to share their needs with their chair. "Supporting the head" is a key role for trustees, yet what heads mean by "support" frequently does not match what board members mean. That can be a source of frustration for many heads and make a hard job even harder.
- The complexity of the job today merits ongoing support from a coach or mentor, supported by the school.

Feedback

Long-Term Heads

- Heads should work with trustees to develop a succession plan, creating clarity about the board's intentions for the current head's tenure and maintaining a plan for unforeseen shifts in leadership.
- Heads are responsible for updating the board and confirming congruence as priorities and goals shift over time. It's the head's job to ensure continuity of expectations throughout board turnover and especially during board chair transitions. This is key to maintaining trust with board members and minimizing opportunities for trustees to depart from shared, established head-board priorities.

Shifting the Trend

The importance of trust cannot be overstated. It's the foundation of the critical head-board chair relationship. Without it, the relationship will not be healthy and high-functioning. The search process must establish trust from the start, and that trust must continue throughout the search process, the head's tenure at the school, and in the head and board's planning for a scheduled and expected peaceful transition to a new head.

In an era where headship has grown complex and unwieldy even for seasoned veterans, boards and heads need to invest in an intentional partnership to build trust, relationships, mutual expectations,

and shared goals. We can shift the trend and diminish the incidence of unplanned transitions; our school communities deserve it.

New Resource: Head of School Database

School leaders tend to turn over at about 10-14% a year, on average, creating potentially 200 head of school searches in any given year. That search process, where the critical head-board relationship begins, is driven by board members who are working with consultants and need to quickly understand the process and playing field of search in the independent school industry. At the same time, head of school candidates are navigating the same process, researching the schools they're considering. To help trustees and head of school candidates gain a better understanding of the search and transition process, the Southern Association of Independent Schools, with funding from the E.E. Ford Foundation, created the Head of School Database (HSDB).

The [HSDB website](#), which gathers publicly available data from a variety of sources, provides information and visible reports on school head histories, search timing, consulting assignments, immediate prior job appointments, school basics, and more. Its robust search function allows users to learn more about search firms and individual consultants, the history of firms' searches and tenures of placements, the history of headship at different schools, and heads' tenure in different kinds of schools. Users can search by school to see its head of school appointment history; by head of school name to see an individual's appointment history; by consultant name or agency to see schools that used that consultant; and by agency name to see a list of schools that used the agency and the head tenure for schools that used the agency.

Feedback

The site also features a variety of reports and dashboards, such as the Average Head Tenure report, which allows users to see the head tenure data for a specific area based on ZIP code, and the Tenure of Headships Dashboard, which allows users to set filters to understand the median and mean tenures for specific kinds of schools.

Support System

Perhaps the most critical factor to a head's success is having—and feeling—support from the board. It seems obvious, but fostering and tending to a supportive relationship requires care and practice. *Independent School* magazine has examined this topic from a variety of angles over the years.

“[Supporting Heads](#),” an article in the Fall 2016 issue, explores what heads need and value most, whether male and female heads value different types of support, what support is most valued at different stages of headship, and perceptions about what types of support are provided.

In “[The Conversation](#),” in Spring 2020, a head of school and a board chair share a thoughtful, honest

conversation about the kind of support heads are looking for from their boards and how boards can carry through, making the space to discuss different kinds of help in different moments, and the importance of acknowledging just how hard it is to ask for it.

AUTHOR

Carolyn Chandler

Carolyn Chandler is a partner with Strategic School Leadership. Prior to that, she served as head of school for 11 years at Metairie Park Country Day School in New Orleans, Louisiana.

John Gulla

John Gulla is executive director of the Edward E. Ford Foundation. Prior to that, he served as head of school for 14 years at The Blake School in Minneapolis, Minnesota.

Olaf Jorgenson

Olaf Jorgenson is head of school at Almaden Country Day School in San Jose, California.

Feedback

▶ [HOW TO SUBMIT AN ARTICLE](#)

▶ [SUBSCRIBE](#)

▶ [ADVERTISE](#)

▶ [ARCHIVES](#)

▶ [ABOUT INDEPENDENT SCHOOL](#)

Recent Issues