



# Collaboration and Inclusion: *Why Process Matters*

Jerry Larson & Katherine Stuart

In February 2020, before the world changed, we connected at The Heads Network 100th anniversary celebration and were reflecting on women in leadership with Sissy Wade, the Executive Director, when we started to talk about “why process matters.” Having been in independent schools for quite a while and for the last fifteen years as consultants, we often get asked, “So, what’s your process for... a head of school or administrative search, planning, leadership development, executive coaching, conducting a governance workshop..?” Inevitably, we discuss the importance of engaging others in our process. This need rings true

whether you're a consultant working with a school or a school working with parents and their child. People want to know: "What's your process and how is it personalized for each school?" As search consultants to independent schools, we have been seeing a trend away from establishing robust processes, not only in leadership searches, but in basic decision-making and strategic planning.

In his [article in the summer 2020 issue of Independent School Magazine](#), John Gulla of The Edward E. Ford Foundation wrote "There's a correlation, I think, and potential causation between sustained, continuous leadership of a school—heads and boards—and the success or health of the school." In talking about success or the health of a school, Gulla states: "thinking in the long term is a fundamental, maybe even primary, responsibility of all heads of school and boards." Gulla suggests that board members, and we would suggest heads of schools, are holding the school in trust for an as yet unseen future.

In order to achieve this unseen future success, there is a need for a sustained partnership between the board and the head of school, with no secrets or surprises, and a school culture that is strong and closely aligned to the organization's mission, core values, and philosophy. Transparency is vital in these processes. For example, being clear about the criteria that determined why particular candidates were chosen over others will showcase the values that the school finds important. This builds trust and creates integrity in the process—following a pre-determined plan tailored to each individual school and sharing that plan with those who are interested, helps ensure that bias and inequities are avoided as much as possible.

Gulla goes on to suggest, and we agree, that a revolving door, or frequent resignations of school leaders makes a school vulnerable, and that all too often schools overlook the value of an enduring leadership team and the benefits of long-term thinking, which brings us back to the importance of process and the NAIS Principles of Good Practice (PGP).

Principles of Good Practice "are designed to help guide independent schools to become the best education communities they can be," providing guidance for an individual school's big picture issues and major operational areas (admission, athletics, business office, education, equity and justice, financial

aid, head of school, and trustees to name a few of the PGP). These PGP are meant to inform process and emphasize mutual responsibilities.

NAIS, guided by its mission, values, and vision, regularly reviews the Principles of Good Practice for various operations in member schools. These Principles also include head of school searches, search consultants, and general hiring principles, which Gulla suggests should guide search consultants' work and a school's search process. We would agree. A robust, inclusive and collaborative process individualized for each school is vital for the long-term success of a school.

Through a focus on the right processes, in the right way, schools can design their way to a sustainable future. A good process provides a way to communicate and apply consistent standards and practices that allow for learning and greater understanding of the current issues of the day, including the organization's purpose and how it fits into the bigger picture or long-term thinking. Process allows others (faculty, students, parents, alumni, administrators, and other trustees) to understand how decisions or plans are being made.

*In a time of uncertainty and ambiguity with health crises and social unrest, now more than ever, we believe independent schools need to embrace engaging and transparent processes for significant events and issues in the operation of a school.*

If designed with long-term thinking in mind, a good process also is inclusive, inviting others to participate in some way, which can include other points of view in the process. By including all of the interested parties, the school can build a collaborative process and stronger consensus for the end result, be it a response to a global crisis, a search for a new head of school, or a vision for the future. Although there is a limit to a group mentality's usefulness, the more eyes, experiences, thoughts, and backgrounds that the school can bring together, the more perspectives will be brought to examining a particular issue. Inclusion helps the school create real priorities and stick to them.

Some may state that having a well-defined process is too rigid for creativity, flexibility, and achieving stunning results; we would disagree. A well-defined process allows for more creativity and thinking differently, because next steps are clearly defined for moving a decision or idea forward. That's not to say there isn't a danger of becoming too transactional by just checking the boxes along the way. It is here where it is important to understand a critical difference between independent schools and many other organizations, especially businesses where there is a clear financial bottom line. Schools are a collection of different stakeholders that include the workers (administration, faculty, staff, and volunteers) and customers (parents, students, alumni), where each group may have different expectations and there are many critical decisions and events that schools need and want to have stakeholder engagement. While no two schools are exactly the same, the basic stages of the process should be similar and include access points for full engagement of the school community.

A plan, a new leader, or a new project will ultimately be better received, and more successful with the participation of a variety of constituents. In head of school searches, an often quoted statement is, "the board hires the head, and the faculty, or parents, fires the head." That is why we believe a clearly defined process can be transformative; it is inclusive, engaging a variety of different groups. A good process is collaborative and at times can be iterative, where growth and learning can occur. A pre-defined process that everyone works to create also balances "influence" among the various interested parties without overstepping boundaries or the proper lines of authority. By giving each group established roles in the process, each will feel as if they contributed in a meaningful way without feeling as if their opinions or preferences were ignored. Further, the right level of parent involvement also often reaches far beyond the search and hiring stage, as well. If parents are interested in the search process, they are almost always also invested in a successful outcome when the new head of school is appointed and begins their leadership tenure. Often constituents who are vested in the search, whether serving on the search committee or not, become contributing members of the transition team.

In a time of uncertainty and ambiguity with health crises and social unrest, now more than ever, we

believe independent schools need to embrace engaging and transparent processes for significant events and issues in the operation of a school. As John Gulla stated, it is important that "heads and boards adapt the perspective that this is their school forever, that every decision they make they'll live with open-endedly. It is the job of heads and trustees to feel and operate as though they are long-term owners of the school, not renters."

A head search is so much more than just presenting and interviewing candidates. Identifying someone who will further the school's mission and ideals is absolutely vital for the longevity of any type of educational organization. Creating and refining a collaborative, inclusive process is one of the best ways that can ensure that a school will find, attract, and retain the ideal candidate. By following the Principles of Good Practice, taking the time to design and implement a collaborative and inclusive process, and having a long-term focus, with a strong partnership in mind, schools will ensure leadership will be an asset for the organization for years to come.

This is why process matters.



Jerry Larson  
Managing Partner  
Educational Directions  
[www.edu-directions.com](http://www.edu-directions.com)



Katherine Stuart  
President  
The Education Group  
[www.educationgroup.com](http://www.educationgroup.com)