



*PHI I = Prospective Heads attending Institute for the first time*  
*PHI II = Prospective Heads returning for second year*  
*PHI III = Prospective Heads returning for third year*

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**WEDNESDAY, JANUARY 9**

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1:15 Welcome and Introductions for PHI I, PHI II and PHI III *La Paloma*

***Topics for PHI I – Barbara Hodges and Linc Eldredge*** *La Paloma*

- 1:45-2:15 • Do you really want to be a Head of School? Why? Are you ready?,  
Dr. Barbara Hodges
- 2:15-5:00 • Overview of Search Process, Linc Eldredge  
- Timeline for a typical search  
- Different models of search firm approaches  
- Search profiles and how to read them
- Resumes, Linc Eldredge  
- Psychology of reading a resume  
- What a resume should include  
- Deconstructing a resume  
- Case studies

***Topics for PHI II – Ryan Kelly, Joe Seivold, and Jan Pullen*** *La Fontana*

- 1:45-2:45 • Communication & the Role of Leadership 201, Joe Seivold
- 3:00-4:00 • Governance 201, Jan Pullen
- 4:15-5:00 • Case Studies, Jan Pullen and Joe Seivold

***Topics for PHI III – Ryan Kelly and James Milford*** *Courtyard Conference*

- 1:45-3:45 • Financial & Risk Management 301, Ryan Kelly and Larry Pittman
- 4:00-5:00 • Lessons Learned from the First Year of Headship, James Milford

\*2:30-3:00 *PHI I, PHI II, and PHI III: Break and refreshments*

***PHI I, II and III*** *La Paloma*

5:00 • Resume Review with Linc Eldredge  
(optional, but recommended)

6:00 Reception *La Veranda*  
(cash bar available)

7:00 Dinner with roundtable discussions *La Hacienda*

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## THURSDAY, JANUARY 10

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7:30 – 8:15      Breakfast      *La Hacienda*

***Topics for PHI I – James Milford, Jan Pullen, and Joe Seivold***      *La Paloma*

8:30-9:30      • Leveling Up in Leadership 101, James Milford  
9:35-10:30      • Fundraising 101, Jan Pullen  
10:30-10:45      Break and refreshments  
10:45-11:45      • Communication 101, Joe Seivold  
11:45-12:00      • Q & A

***Topics for PHI II – Linc Eldredge and Ryan Kelly***      *La Fontana*

8:30-9:30      • Interviewing, Linc Eldredge  
9:30-10:45      • Finance & Risk Management 201, Ryan Kelly and Larry Pittman  
10:45-11:00      Break and refreshments  
11:00-12:00      • Human Resources & Related Issues 201, Ryan Kelly and Larry Pittman

***Topics for PHI III – Linc Eldredge, Jan Pullen, and Joe Seivold***      *Courtyard Conference*

8:30-9:30      • Fundraising 301, Joe Seivold  
9:45-10:45      • Interviewing Tips, Linc Eldredge  
10:45-11:00      Break and refreshments  
11:00-11:45      • Leadership & EQ, Jan Pullen

12:00-12:30      Lunch for PHI I, PHI II and PHI III      *La Hacienda*

***Topics for PHI I – Barbara Hodges and Ryan Kelly***      *La Paloma*

12:45-1:45      • Finance 101, Ryan Kelly and Larry Pittman  
2:00-3:00      • Governance 101, Barbara Hodges

***Topics for PHI II – Jan Pullen and Joe Seivold***      *La Fontana*

12:45-3:00      • Enrollment Management & Marketing, Jan Pullen and Joe Seivold  
• What's on Your Mind?, Jan Pullen and Joe Seivold

***Topics for PHI III – James Milford***      *Courtyard Conference*

12:45-1:45      • Case Studies & Contracts  
2:00-3:00      • Entry Plan: First 100 Days

***PHI I, II and III***      *La Paloma*

3:15-4:00      • Q&A with Panelists

4:00      Adjourn