

Head of School Transition

Action Planning Checklist for the Board

<i>Action</i>	<i>Coordinator</i>	<i>Due Date</i>
1. Collaborate with outgoing Director to...		
a) complete current initiatives		
b) sustain ongoing operations		
c) tee-up planned activities/undertakings		
d) effect a smooth transition		
e) celebrate outgoing Director's contributions		
2. Mold the new Director's perception of the school, community, and board		
a) Consider site-visit in the spring		
b) Establish a correspondence plan		
c) Build a relationship with the continuing/prospective Board Chair		
d) Communicate result of EOY parent/staff survey; Board self-appraisal; Board goals		
e) Inform new Director about board business (copies of agendas, reports, minutes)		
3. Mold the community's perception of the new Director		
a) Consider site-visit in the spring		
b) Newsletter introduction		
c) Letter to the community from new Director		
4. Clarify the general expectations for the Director's performance		
a) Update the Job Description		
b) Ensure the Contract is clear and complete		
c) Provide copies of ByLaws, Policy, Handbooks		
d) Provide copies of Accreditation Reports, School Improvement Plan, Strategic, Facilities, and Finance Plans, etc.		
e) Agree on process for Director's goal setting and appraisal		
5. Affirm strategic direction of the school		
a) Affirm Strategic Plan this year		
b) Update Action Plans this year		

6. Identify and communicate specific mandates for the new Director		
a) Immediate needs (e.g. faculty salary and benefit review)		
b) Planned endeavors (e.g. an approved building project)		
c) Aspirations (e.g. increase enrollment)		
7. Hand-off between new and outgoing Director		
a) Clarify authority/responsibility (hiring, goal-setting, handbook, timetable)		
b) Brief the new Director on pending/potential hot-button issues		
c) Keep the new Director informed about significant operational matters, as appropriate		
8. Director's Entry Plan		
a) Request that a formal Entry Plan be developed by the new Director and shared with the Board		
9. Logistics		
a) Provide support for travel , shipping, housing arrangements		
b) Provide proactive family support (transition of spouse & children before and after arrival)		
10. After Arrival		
a) Plan the first 72 hours (airport welcome; Meet & Greet; staff support)		
b) Provide venues for relationship-building with staff & board		
c) "Meet the Director" event for the community		
d) Introductions to key players in the community (Ambassador, Ministry officials, partner agencies)		
e) Conduct board retreat to team-build with Director and clarify roles, responsibilities, and expectations		
f) Ongoing monitoring of "settling in" by board chair (weekly meetings)		
g) Collaboratively develop an annual calendar for the board, scheduling major tasks		
h) 100-days "how's it going" review		

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