Head Search Protocols

Based on our experience, ISACS would recommend that schools beginning the head search process pay some attention to the following matters:

1. Seek Counsel:

   - If using a headhunter firm, call for recommendations some schools who have recently undertaken a search and interview three firms who receive high word-of-mouth ratings: budget $20-50,000 for consultant's fees and another $10-15,000 for expenses (advertising, travel for consultants and candidates, dinners, etc.). (ISACS recommends all of the head search consultants listed in the corporate sponsors section of the ISACS Directory.)
   - If not using a search consultant firm, consider calling upon a consultant for a two-day search workshop, day-1 for fact-finding at the school (focus groups) and day-2 with the initial core membership of the Search Committee: budget $10,000 for search-related expenses. (See ISACS Directory for listing of independent school consultants.)

2. Establish a Search Committee:

   - Keep the committee small (8 members or so), mostly trustees. Trustees on committee should include Chair, Chair's heir apparent, and other key trustees who will remain on board, some of whom should be current parents. Also include opinion leaders from the faculty, parent, and alumni bodies.
   - Create advisory committee(s) of faculty, parents, students, alumni: Note in advance to the advisory committee(s) that advising is not the same as choosing (the latter being the exclusive prerogative of the board). It is a good idea to set up the advisory committee(s)'s procedure in such a way so that the committee(s) indicate to the search committee perceived strengths and weaknesses of the candidates rather than "scores" or "priorities" or "preferences": i.e., It is important to avoid situations where an advisory committee "makes a choice" since it may not be the same choice as the board eventually settles on. Advisory committees should not do the initial screening of applications but be invited to the initial focus group sessions where leadership priorities are
identified and to the interviewing stage for the last 2 or 3 semifinalists.

- Develop a calendar: An ideal schedule is to do preliminary work over the spring and summer and begin intensive interviewing in the first months of the fall—the strongest candidates wish to settle matters as early as possible, so push for a November/December decision time-line. If a change in leadership is known well in advance (18-months), consider an earlier start so that during the winter and spring of the year preceding the current head’s last year, a "quiet phase" can begin of soliciting interest from educators who have not already decided to make a change: i.e., sometimes the best candidate for one’s school is someone who "didn’t know" he or she would be interested in making a move. (This early contact with such candidates is necessary in some cases because of the 12-24 months notice clause in many sitting heads’ contracts).

3. Establish a Needs Assessment Mechanism: (Search consultant focus group interviews over two to three days with key constituencies, for example.)

- Determine the leadership style most appropriate for the school at this juncture: corporate (action & change-oriented) vs. collaborative (relationship & peacemaking-oriented) vs. visionary (dynamic & energizing-oriented).
- Assess the leadership skills and emphases most needed and sought.
- Articulate aptitudes and qualities sought in new leader (beyond the usual of vision, sense of humor, organizational and people skills, etc.).
- Define the immediate needs and the long-term goals of the school.

4. Prepare an Announcement of Opening and Ad Campaign:

- Request that inquires submit 3 documents: letter of interest, resume with three references (reference letters submitted later, upon request), and statement of educational philosophy. (Consider requesting that all inquiry documents be submitted electronically, as attachments to an e-mail: they could then be easily posted on a secure, password-protected website to which only the search committee would have access.)
- Quiet phase: Consultant contacts those in the field who fit the profile and are not actively seeking a new position.
• Mailing to all constituents: School Profile and Leadership Profile. General soliciting of constituents to nominate and encourage candidate to submit resumes with references, three letters of recommendation, and a statement of educational philosophy. Mailing to all ISACS/NAIS school heads and division heads.

• Placing of ads in Ideas & Perspectives (ISM Newsletter), Independent School (NAIS magazine), Education Week, Chronicle of Higher Education, The Blue Sheet (Educational Directions).

• Posting of opening on the Internet (via Job Openings Section of the ISACS website www.isacs.org) and on the school’s own website.

5. Screen Initial Inquiries:

• Determine who will screen initial inquiries: Consultant alone? Consultant with search committee member? Whole search committee?

• Develop rating system based on leadership profile criteria: e.g., A = All-star candidate; B = Better consider this one; C = Can’t see a match here. Failsafe system to upgrade initial B’s and C’s?

• Establish response protocol and procedures: All inquiries receive immediate acknowledgment; rejection notices mailed promptly; fortnightly correspondence with those remaining in the pool after each screening round to apprise of search progress, etc.

• Wean list of As to the "Top Twenty." Do initial 30-minute telephone interview with Top 20: add notes to dossiers for each of the candidates.

• As a committee, assess the Top Twenty dossiers to make the next cut: "The Top Ten" (6-10).

6. All First-round Interviewees:

• Prepare a mailing for Top Ten, to include catalogs, bulletins, school newspapers, budgets, last evaluation summary, any development or strategic planning case statements, etc.

• Determine early if an internal candidate is a real contender: If not, arrange for graceful withdrawal of candidacy; if so, know that other strong candidates may be disinclined to compete, assuming, perhaps incorrectly, that the internal candidate has an unfair advantage or that choosing another will divide the school.
7. Prepare a "Condition of School" White Paper for Semi-finalist Candidates (for their pre-visit "homework"):

- Provide school statistics (academic, admissions, development, budget, survey of constituents results).
- Develop faculty and student profiles.
- *Indicate status of last evaluation and long-range plan recommendations.

8. Develop Semifinalist List:

- Invite Top Ten candidates (6-10) for an initial screening interview with the search committee--plan on a 1 1/2 hour session with a 30-minute reaction period by the committee after the candidate leaves for a total of two-hours per candidate. Screening to take place at school or at a neutral site (such as an airport hotel conference room). If possible, schedule all candidates over two days.
- Determine level of seriousness of each candidate.
- Reassure candidates that their candidacy will remain confidential unless they enter the finalist category.
- Develop an initial list of 4-5 most promising candidates: segregate list into 2-3 finalists with 1-2 alternates (should any of your finalists drop out for any reason).
- Search chair alerts 2-3 semifinalist candidates that he or she will do reference calls and background checks with people not on the reference list.
- Ask the semifinalists to submit to psychometric testing to determine skills and aptitudes and the match between those and the current needs of the school and to glean the most pressing questions to ask. (Consult with ISACS regarding its on-line battery of tests: $750 per candidate tested.)

9. Arrange Candidate Visits to School:

- Invite 2-3 finalists to campus, with spouses, for the final round: two-day visit, with evening dinner with search committee representatives followed the next day with interviews with all advisory groups and with each key school player; schedule voluntary open sessions with school faculty, staff, students, parents, trustees: candidate is invited to share some general thoughts with each group then respond to questions.
- Develop a feedback mechanism for each group to funnel reactions to search committee. Develop in advance, in
conjunction with each candidate's spouse, an itinerary and schedule for visits and tours as desired. Remember, the spouse's reaction to moving into a new community is a key factor in attracting the candidate to come to one's school, so spouse and family needs and aspirations are critical to know and to address. Final event of interview day: meeting with full search committee for impressions and general discussion.

- Search committee chair has confidential chat with each candidate to discuss contract matters: check with ISACS and/or NAIS office on range of head salaries and benefits and on typical contract parameters. ISACS recommends a three-year contract with multiple-year renewals negotiated the summer prior to the final year for each expiration date (i.e., a minimum of 12-month notice given by either party). See sample head contract on the ISACS website: www.isacs.org.

10. Cut to the Chase:

- Search committee meets to determine top choice.
- Search committee reps arrange visit to the leading candidate's current school for on-site interviews with candidate's current colleagues and student leadership. Note: This stage is highly sensitive and disruptive, so ISACS recommends, contrary to the counsel of search firms and current practice, that the on-site visit only occurs with the one finalist who is the clear leading contender.
- Assuming no last minute red flags, the search committee meets en toto to make a unanimous recommendation to the Board.

11. Know That Final Matters Matter:

- Once contract is signed, make mutual arrangements for simultaneous announcements.
- Search committee becomes transition team: Develop schedule for new head to visit school for major events, a board meeting, etc. At an early executive committee meeting in the fall, board chair and head establish goals and evaluation criteria/process for the new head and determine a schedule for frequent chair/head meetings. The transition team, with the head and spouse, plan a social calendar to introduce the new head to the community and a pr calendar of speaking events to capitalize on the enthusiasm and interest a new head generates.
Resources/Places To Advertise:

- I.S.M., Independent School Management's Management Mart, Classifieds, 1316 N. Union St., Wilmington, DE 19806, Office 302-656-4944, Fax 302-656-0647
- Education Week, Classifieds, 6935 Arlington Rd., #100, Bethesda, MD 20814-5233, Office 301-280-3100, Fax 301.280-3250
- Educational Directions, Inc., The Blue Sheet, P.O. Box 768, Portsmouth, RI 02871, Office 401-683-3523, Fax 401-683-6120,
- The Chronicle of Higher Education, Bulletin Board, 1255 23rd Street, N.W., Washington, D.C. 20037 Office 202-466-1050 Fax 202-296-2691 Email jobs@chronicle.com
- ISACS Website: Job Openings, www.isacs.org

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