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THE CORE PRINCIPLES OF A SUCCESSFUL SEARCH: ADVICE FOR BOARDS AND HEADS

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A few years ago this Consultant published an article about the pitfalls of the head search process and the keys to its success. Littleford & Associates has conducted and observed head searches worldwide since that time, and it is clear that the same patterns of behavior (and misbehavior) and the keys to a successful outcome have not changed. Miscalculations and mistaken assumptions inherent in many searches may jeopardize landing the candidate of choice, undermine a new head or damage the relationship between him or her and the board. The lessons heard are worthy of repeating.

I. Inside Candidates

One of the first challenges facing a search is how to deal with internal candidates. Some search committees believe it is wise to ask one or more insiders to throw their hat into the ring. The old adage "the devil you know is better than the devil you don't" has some merit, and inside candidates have the added advantage of needing relatively little time to adjust to their new role while outsiders need at least three years to do so.

On the other hand, such candidates often have little or no realistic chance of success. Why? The "warts" of the insider are only too well-known and boards seem to want "fresh blood" not afraid of instituting change and upsetting the school culture. A risk to the school is that if the insider's "run" is destined to fail, the school will be left to manage that individual's unhappiness and disgruntlement. In the worse case, the bypassed insider could undercut the new head with teachers or parents.

Sometimes there is one strong inside candidate whom the board really wants to appoint but feels that it must undergo a search in order to satisfy the community; engage in a "transparent" process; and grant legitimacy to that individual. Such a search normally discourages the best contenders who see the handwriting on the wall early on. What if some new information or a new development makes the internal candidate less attractive, or a deal cannot be struck? There is no desirable outsider to whom the school can turn.



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One School recently had a strong Assistant Head who had been waiting in the wings for some time. This Consultant conducted focus groups with a cross-section of key constituents on school climate and quickly reached the conclusion that this Assistant Head was highly respected and would be embraced widely as the new Head of School. The wise Board moved quickly to appoint him. He has enjoyed a relatively seamless transition; he has a healthy relationship with the Board; he is executing the mission according to the strategic plan: AND the School saved all of the expense of a full-blown search.

Thoughts:

1. Encourage only the strongest "inside hopefuls" and convey your decision early on. Give a consistent clear message to the school community about that decision. Do not waver.
2. Do not appoint the inside candidate as an Interim or Acting Head. That will drive away savvy, qualified outside candidates and give the insider an unfair advantage.
3. Make a complete informed and objective assessment of whether the insider fits your profile and whether a search is really necessary for the "optics."

II. Compensation Issues

In a recent situation a Head candidate was told by the Search Consultant that he would be hearing from the Search Chair with an offer. The value of the total offer was less than what he was currently receiving. The Candidate was a self effacing type for whom negotiating was unpleasant and was dismayed to receive such an offer. He declined it.

Even after repeated attempts to reopen the dialogue and renegotiate, the Candidate refused to budge. He felt that such an offer may well reflect the kind of board with which he might be working. All parties felt the effects of miscommunications and let down. The School Search Committee was forced to start anew as none of the other potential candidates were the caliber of the one who rejected the offer.

Sometimes after receiving an offer, the finalist raises the "ante" by asking for pay or benefits that were never on the table as part of the initial compensation conversation with the search consultant or the search chair. These could be totally fair and OR the requests could indicate a future pattern of behavior of the head of conveying one sentiment at one time and changing course unexpectedly. The chair may grant these requests in order to close the deal, but an underlying resentment about that may linger, and the new head may find him or herself under more pressure to perform.

Thoughts:

1. Ensure that your search consultant is skilled in negotiating the complete compensation



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package OR seek an outside experienced facilitator to bring quick closure to the process. The more protracted the negotiations, the greater is the potential for damage to the relationship between the new head and those who have been entrusted with the responsibility of reaching an agreement. In one search led by another firm, the Search and Board Chairs called Littleford & Associates and said that they thought that the bargaining would be simple but that the Candidate kept making new requests. The Search committee felt pressed both by the total amount needed to meet the expectations of the Candidate and by the jump it represented from the predecessor's package. The predecessor was a woman who had been promoted from within. Females and insiders are often underpaid in the marketplace. The recipient of the offer was a male with many years of headship at two prior schools. He knew his value and turned the bargaining with the Search Chair over to his financial advisor.

The Advisor's tone and corporate style offended the Search Committee. The initial agreement began to unravel and Littleford & Associates stepped in. Schools often hire our Firm for this purpose. We asked the Candidate to remove his spokesperson from the equation and to specify his priorities. We asked the Search Committee to step up to meet the most reasonable requests. The parties struck a fair deal.

2. The candidate should lay all of his/her cards on the table but NOT prematurely as that conveys arrogance. Communicate openly with the search consultant and chair about which issues are negotiable and which are not.

III. Concern Regarding Education of Children and Meaningful Work for a Spouse

There is a range of key transition issues, but most head candidates will not consider seriously an offer unless the educational choices for their school age children meet their various needs. In a recent search the Search Chair flew across the country to make an offer in person to the Board's first choice Candidate and that offer included the School's plan for meeting the unique academic needs of the Candidate's daughter. On the other hand, if the inability of the school (or alternative local schools) to meet a child's needs satisfactorily becomes clear, it is best to be upfront as soon as possible so both parties can pursue other options.

In another recent case, the Head's spouse reluctantly gave up her promising marketing career in a large metropolitan area. The move to a new school seemed to be the ideal opportunity as well for the spouse to stay at home with the couple's young children. However the family is missing her income and she is missing professional fulfillment. The head support committee must address these concerns or they may gradually erode the Head's and the family's desire to remain long term.

IV. Looking for the Messiah or the Charismatic Leader



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Most search committees want an educational visionary with strong people skills, a pied piper with students, a fund raiser with the ability to pull in six figure gifts, an astute financial manager, and an enrollment and marketing genius. They will find it easy to embrace someone who loves sports, has bright well-behaved children, a selfless charming spouse and impressive academic credentials. He or she should also be a prodigious worker whose door is always open. In other words, everyone wants "God on a good day."

It is very important for the profile to signal priorities among the long list of desired traits and qualities. But even after doing so, search committees often choose someone very different from the profile developed initially. That is because "chemistry" and a successful visit often trump the official skills stated in the profile.

Thoughts:

1. There is no perfect candidate. The best leaders know how to build a strong team which buffers and complements his or her weaknesses. Certain skills can be bought from experts in the marketplace. Be open to but not bowled over by "chemistry".
2. Most heads are former teachers. Most teachers are care givers and not risk takers. Thus, heads tend to be risk averse. The more analytical the head, the less charismatic he or she may seem. BUT the more successful he or she may be long term for not having made decisions that affect the culture too quickly.

V. The Pendulum Effect

One School replaced a long serving, beloved Head with a younger dynamic visionary who brought enormous energy to the School. He set out to implement the long list of changes that had built up over time and that the Board demanded. The new Head quickly became perceived as showing insensitivity to the School's traditions and cultural norms and pursuing change at a pace that was not sustainable. He was gone within three years and became labeled the "sacrificial lamb". A diplomatic charismatic leader replaced him.

Thought:

Avoid the trap of choosing a leader repeatedly with a polar opposite style and personality from the preceding head. It results in too much instability for the school in the long run.

VI. Healthy Board Governance

All searches result in an unhappy outcome if the board does not have an effective chair and a well trained board who understands and applies the principles of healthy board practice. Trustees who speak out of turn, gossip, criticize the previous head or exhibit micromanaging behavior send the



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message that they are an unprofessional board that would scare any head.

Handling reference checking with complete confidentiality and diplomacy, especially where sitting heads whose interest is not known to his or her current school are involved, is of paramount importance.

Boundaries and channels must be observed at all times. There can be no side bar conversations between the search committee and other constituent groups, including other board members, unless a formal structure of advisory committees is set up and the rules for their communication with the candidates and the search committee are very clear and followed explicitly.

A head search should not be a democratic process. It is risky to allow too many people who have no training in basic board governance to have input and a role.

All committee members have private agendas at some level as each seeks a trait or experience in a new head that reflects his or her own definition of the mission. However, some members may have an inappropriate motive such as wanting to hire a head who might fix a narrow parental based issue.

Thoughts:

1. Avoid choosing anyone for either the search or an advisory committee who may have a hidden agenda.
2. Train ALL search and advisory committee members, with the help of the search consultant, on appropriate questions and behavior towards candidates. Search committees who appear to have handed over the process to one or more vocal constituent groups often lose their first choice candidates and either "settle" or start the search again.
3. The professionalism of these committees reflects upon the school and is the first "voice" that the candidate hears. The committee(s) must sell as well as screen.
4. The partnership of the chair and new head is forged in the process of the search. It is always preferred that the search chair and the board chair stay on for at least one year after the new head is hired.

VII. The Importance of Transition Planning

Boards love the excitement of the "hunt." The search is the easier more exciting stage compared to the transition phase when most schools drop the ball either out of fatigue or lack of knowledge or guidance.

Thoughts:



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1. There should be a transition committee which is small, confidential and composed of wise highly respected board members. Its key role is to ensure that the head does not fall into "traps" or cross powerful and important constituents.
2. The transition committee also helps to ensure a smooth transition for the head's family including the physical move, school placement and the role of the spouse.
3. The transition committee needs to remain in place for at least a year, and perhaps for up to two years beyond the welcoming, honeymoon phase.
4. The committee should not micro manage the head or be intrusive.

All searches that result in the selection of outsiders cause some loss of momentum for the school initially. PATIENCE is key.

VIII. Search Strategies

Appointing an interim head is a good option when there is insufficient time to conduct a full national search; when the prior head leaves suddenly; when the community needs some healing; or, for example, when the prior head was a pied piper leader much beloved by all. Be sure, however, that all parties and constituents are clear about the Interim's future at the School.

In an external search, it is imperative that three to five candidates remain engaged in the semifinalist stage and two finalists be kept in the loop until the first choice person agrees formally. On the other hand, continuing to look too long for the "right" candidate may lead to an aborted search AND misleading a candidate to the extent that he or she jeopardizes his or her current position gives the school a bad name.

IX. Treat the Departing Head Respectfully

"The king is dead" refers to the departing head. While the departing head usually knows his proper place in the search process, he/she is concerned about his legacy and may be anxious about the next career move. Treat him or her professionally and with gratitude and respect assuming that the separation did not result from egregious behavior. Plan a celebration of his/her accomplishments. Invite him/her back to the School for very important events.

Remember that the new head will be watching how the departing head is treated as a sign of the treatment that he or she can expect to receive.

X. Conclusion

The search is a process that becomes far more complicated in some schools than others. We have seen small schools with clear cut needs experience a very difficult search due to highly sensitive cultures. We have seen large multinational schools conduct a very sophisticated search culminating



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in a widely acclaimed selection.

The key steps in the process are simple:

1. Hire the right search firm (or conduct it in house but have a board member undertake it who has the time and instinct to do it well).
2. Establish an appropriate timetable.
3. Develop an accurate, realistic and enticing profile.
4. Form the search committee and establish the rules of the game for all players.
5. Outline the communications strategies.
6. Treat all candidates with respect.
7. Ensure you do not lose strong candidates by dragging out the process or by not being up front, professional and fair with all.
8. Sell all comers on the reasons why they should want to head your school.
9. Ensure a successful and smooth transition by making transition a priority.

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