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## **THE HEAD SEARCH, SCHOOL CULTURE AND TRUST IN THE CONSULTANT**

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Most independent school trustees view a head search as the most important and time consuming task that they will ever undertake in that role. In fact it is an honor and privilege for many trustees to be invited to serve on a search committee. Therefore, these committee members need to have rapport with and trust in their chosen search consultant in order to achieve the outcome that is best for the school, and frankly, which reflects positively in turn upon them.

If the search process does not land the preferred candidate and one with staying power because he or she does not mesh with the school culture, no one wins. Or if the contract negotiation process either is not professionally handled or leaves unspoken but lingering bad feelings, there is a carryover to the relationship between the new head and the board that threatens the chances for a long-term successful headship.

In selecting a search consultant to find a head of school (or CEO for a non profit), the determining factor is usually the chemistry of the consultant with the board chair, search committee chair and/or others on the committee. What is probably most important, however, in that selection is the consultant's prior knowledge or knowledge that he or she works diligently to acquire about the school's culture, mission, history and the political realities that may be landmines for the next head or CEO.

### I. The Dynamics of the Consultant/Search Committee Relationship

Rarely done but a very good idea is to choose a search consultant who is already familiar with the school from other work or assignments. If the consulting firm has worked with the school in the realm of governance, strategic planning, school climate, institutional assessment, faculty compensation or evaluation that consultant may be very well positioned to know the type of head candidates who are mostly likely to succeed in that school and its unique culture and meet the expectations of the board, staff and parents. Contrary to popular belief it is a plus not a drawback for the search consultant to know most of the client school's "warts" and skeletons in its closet. While in theory, the head of school is accountable to the board only, in practice he reports to many constituent groups which all effect the length and success of his or her tenure.



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While the search consultant does not always have intimate knowledge of school and organizational climate, on site work prior to the start of the search is crucial to gaining that knowledge and insights. The assignment could be a governance workshop but should also include focus group meetings with the parents, staff, students, alumni. Most important is acquiring an understanding of the faculty and staff expectations and factions and divisions within that culture which may affect the tenure of the new head.

The consultant will not receive sufficient insights simply by posting a standard online questionnaire on the school's website to gather input from interested constituents about the qualities most sought in a new head or the challenges that he or she is likely to face. Everyone wants "God on a good day", and these days everyone wants to take a school "from good to great".

Search committees, with the advice of their consultant, typically begin the process by developing a profile of traits and experience most desired in a new head. However, often that profile is cast aside as the personal chemistry of one "star" candidate captures the imagination of the Committee. The charisma factor then trumps all others.

At that point, the search consultant needs to have enough knowledge about the committee members, the board culture and membership as a whole to offer appropriate warnings and guidance. The consultant especially needs to know about the school's faculty and staff culture and the history, incidents and tensions that are a crucial part of it and how they are likely to mesh (or not) with the emerging frontrunner.

## II. Transition: More Important than the Hunt

Readers of this Newsletter know that Littleford and Associates has been concerned for years about the lack of substantial transition planning for new heads and CEO's. The excitement and challenge of the hunt and chase take precedence over the planning for that new head to succeed. Expectations will be high and board demands and pressures will be quick and heavy for him or her to move on agendas and produce results.

From this consultant's experience working with 2500 schools and many other non profit organizations, most of the leaders chosen encounter serious transition issues within the first one to three years, and the majority will not succeed or remain in the new position beyond five years. While a five year stint may be considered a successful tenure by some, it is not long enough to leave a lasting impact or legacy upon a school.

Most boards do not choose to go through a process of thinking about governance and transition issues and holding a workshop on that theme with the new head or CEO present. At one client School a new Head was appointed after what appeared to be a thorough search process. Even



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though the candidate had visited the School twice and had a good feeling about the Board, he did not know the degree to which personal and extended family relationships, a powerful network of nepotism, existed within the Board, parent and faculty communities.

While a very few of these long standing and often moneyed family relationships were known to the candidate, the degree and depth of them were not clear. Early on, the Head ran afoul of the cousin of one Board member who was on the faculty. That faculty member worked effectively behind the scenes to undermine the new Head with the relative on the Board because the Head had mentioned the potential need to drop Latin and consider the addition of another modern language in the School curriculum. The teacher with the Board connections taught Latin.

While there were other problems and a complex web of intrigue beneath the surface, this initial misstep by the Head led to his departure after three years. Latin remains in the curriculum. The search consultant knew superficially about some of these family relationships but not about the extent to which they existed among the faculty and staff and the degree to which they permeated the staff culture.

In another search the one faculty member on the search committee preferred another candidate but went along with the majority when it was clear that her candidate would not receive the "nod." But two years later when this new Head initiated some unpopular changes this same teacher let it be known to the faculty that the Head had not been the "faculty candidate" in the first place. She also gave the impression that the new Head was having problems because he was the Board's candidate who was unsympathetic to faculty concerns.

The search consultant had suggested the make up of the search committee without understanding fully that the real reason for the last Head of School's departure was the same pattern of behavior: there had been a split between the board, parent and faculty factions on the search committee and the same grudging acceptance by the faculty representative of the final choice of that Head. The faculty representative (although it could have been the parent or alumni rep as well) was waiting for the new Head to slip on the first banana peel.

### III. The Contract: More than Just the Money

Aside from an intimate understanding of school culture and history and board and faculty politics, the search consultant needs an in depth knowledge of all of the following: the candidate's current compensation package, overall financial health and family circumstances as well as the financial condition of the school, total compensation paid to the current head, the attitude of the board towards compensation and its willingness to be flexible and creative.

Only one person, usually the Search Committee or Board Chair, works with the consultant in



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negotiating the package to be offered to the finalist. The search consultant needs to know the "hot buttons" or "deal breakers" for both parties, and their respective negotiating styles.

When this consultant was leading one west coast search, the desired candidate found himself unable to sell his home in a weak market. Nevertheless, he was willing to accept the package offered by the search chair through the consultant.

This consultant told the story of when he was first hired by Bill Yardley, then Head of Chatham Hall as a young teacher. Years ago, he offered me and I accepted the princely sum of \$5,000 plus room and board. When the offer later came formally in the mail, it was for \$7500. While I was thrilled at the increase, I was also worried that it may have been a mistake. When I called Dr. Yardley, he told me that it was the correct amount and he was looking forward to seeing me. I never forgot that generous gesture. My loyalty to him and the School was predicated in part by that initial message of commitment to me and my family.

When the Chair of this west coast search committee asked me if the new Head was satisfied with his package, I indicated, "yes", but that his wife would have to stay behind to attempt to sell the home. The Search Chair then asked: "Would an additional \$35,000 help in that matter?" I told him I was sure that would be appreciated but unnecessary to sign the candidate. He asked me to tell the candidate that even though he had verbally accepted the formal offer, the School would up its offer to assist with the transition.

I suggested that the Chair make the call. Twenty minutes later the candidate called me and said excitedly, "Why did he offer me \$35,000 more when I had already accepted the earlier offer?" I replied, "Because he is smart."

The other moral of this story is never to underestimate the importance of the happiness of the spouse or partner and children in the head search and transition. Their needs and how welcome they feel in the school community will make or break the partnership between the new head and the school. It is the search consultant's job to remind the search committee to be attuned and as responsive as possible to the family.

In an example of a search which had run so smoothly until contract time, the Search Committee Chair faxed an offer to the candidate. The offer was actually less than the value of the total package that the Head was now receiving at his current school. The search consultant had not done enough digging to calculate the total value of this Head's package. The candidate was a clergy person receiving a tax free housing allowance and 18% in church pension, both of which were unknown to the School making the offer. The candidate was upset and offended but in his self-effacing way was not about to negotiate for a better offer and thus rejected it. This precipitated an angry response by



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the School to the consultant for not having done his homework.

In another case, and one of those rare ones, the Board Chair told this consultant that he wanted to attract the strongest possible pool of candidates in the world. Asked what the highest paid independent and international school heads were earning at that time, he responded about "\$500,000 to \$550,000 in total package value. (It is now closer to \$675,000). The Chair indicated a willingness to pay whatever was necessary.

In the final group were some of the most experienced and highly regarded school Heads in the world from Canada, Europe, the United States, Australia and the UK. Every one of the candidates in that search pool had packages from their current schools in the \$400,000 to \$550,000 range. The School landed its first choice and negotiations were easy. The clarity at the front end about the likely salary and benefits package generated a huge response from the best candidates in the world. You often get what you pay for. The candidate selected is widely admired and accepted by all elements of the community. It was the right fit.

Knowing the school's or non-profit's culture and the political currents within it; having a solid relationship between the consultant and the search chair; understanding the risks of transitions; knowing how to provide clarity on the package from the outset and when to "close" the deal are just a few of the often overlooked but key ingredients in a successful non-profit search process. It is a very different animal than a corporate CEO search.

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