

Head of School Search Step 3E Plan and Execute On-Site Finalist Visits

Transition Search Partners Quick Guide

This roadmap draft is intended as an example.

It should be tailored to the specific needs of the school.

On-Site Visit Overview for Independent School Leadership Searches

Plan A

Plan B

Plan C

Plan D

Travel Day

Sun

Sun

Wed

Wed

Arrive mid-day, transport to hotel for check-in and freshen up

Transport to Welcome Coffee & Dinner

Welcome Coffee: Search committee co-chairs (for head) or hiring manager (for non-head)

Dinner 1: Full board (for head) or other group (for non-head)

Drop off at hotel

On-Campus Day 1: Long Day of Meetings

Mon

Mon

Thu

Thu

Breakfast at hotel or Pickup for breakfast meeting

On-Site Meetings at School 8 am through 4:30 pm (see Meeting Guidance)

Break: Two hour break at hotel for candidate to process the day & rest

Transport to Dinner

Dinner 2: With Search Committee

Transport to Hotel

On-Campus Day 2: Shorter Day of Meetings

Tue

Tue

Fri

Fri

Breakfast at hotel or Pickup for breakfast meeting

On-Site Meetings at School 8 am through 1:00 pm

Optional: Visit with Realtor

Transport to Airport

Optional: Additional Day for Travel or Community

(N/A)

Wed

(N/A)

Sat/Sun

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Questions to Ask

1. Logistics

- 1A. Who will be the primary person organizing the on-site visits?
- 1B. Who will invite meeting attendees?
- 1C. What tools will we use to coordinate the meetings?
- 1D. How will we prepare stakeholders for their meetings?
- 1E. How will we collect feedback from meeting participants?
- 1F. How can we get the candidates into the school in sequential weeks? (Preferable)

2. Travel

- 2A. Who will make travel arrangements with the candidate?
- 2B. Where will the candidate stay?
- 2C. How will the candidate get around locally (rental car, Uber/Lyft, committee members)?
- 2D. How will we handle expenses for the candidate?

3. Candidate's Partner

- 3A. If the candidate has a partner, can he/she attend? (Preferable)
- 3B. What will the partner do while the candidate is busy? (Realtor, social)
- 3C. Can we arrange professional networking meetings for the partner while they're in town?

4. Food

- 4A. How will the candidate and partner access meals and snacks while in town?
- 4B. Does either candidate or partner have any dietary restrictions?
- 4C. Who will be responsible for placing orders for group meals?

5. Candidate Preparation

5A. Will the candidate be asked to prepare a public speech? When, where, and how?

5B. Will the candidate be asked to review, analyze, and discuss school documents?

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Sample Meeting Schedule: On-Campus Day 1 for Independent School Use

Time	Stakeholder Group & Meeting Description	Meeting Size	Priority	Comments
8:00 AM	Admissions: 60 minutes; Campus tour followed by seated meeting	1:1	Required	Early on day 1 for context
9:00 AM	Division Head: 45 minutes per meeting	1:1	Required	As available during school day
9:45 AM	Division Head: 45 minutes per meeting	1:1	Required	As available during school day
10:30 AM	Division Head: 45 minutes per meeting	1:1	Required	As available during school day
11:15 AM	Division Head: 45 minutes per meeting	1:1	Required	As available during school day
12:00 PM	Lunch: If school has 11th and 12th graders, Students If school has no 11th and 12th graders, then faculty group	8-10 people	Important	
1:00 PM	Development Director & Other Senior Staff: 30 minutes per meeting	1:1	Required	As available during school day
1:30 PM	Development Director & Other Senior Staff: 30 minutes per meeting	1:1	Required	As available during school day
2:00 PM	Other Staff: 30 minutes per department	Small groups	Important	As available during school day
2:30 PM	Parent: Group Meeting 1	Small groups	Required	Immediately before carpool
3:00 PM	Carpool: Candidate can attend		Optional	
3:30 PM	Faculty: Group Meeting 1, One Hour	8-10 people	Required	Immediately after carpool
4:30 PM	Transport to Hotel for Regroup and Break			
6:45 PM	Transport to Dinner w/ Search Committee			
7:00 PM	Dinner w/ Search Committee			

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9:00 PM Transport to Hotel

Sample Meeting Schedule: On-Campus Day 2

7:30 AM	Parent: Group Meeting 1	8-10 people	Required	Immediately before carpool
8:30 AM	Development Director & Other Senior Staff: 30 minutes per meeting	1:1	Required	As available during morning
9:00 AM	Development Director & Other Senior Staff: 30 minutes per meeting	1:1	Required	As available during morning
9:30 AM	Other Staff: 30 minutes per department	Small groups	Important	As available during morning
12:00 PM	Faculty: Group Meeting 1, One Hour	8-10 people	Required	Lunch
1:00 PM	Departure meeting w/ search committee chair and board president	2:1	Required	Immediately after lunch
	Transport to Airport			

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