

Head of School Transition Roadmap

Transition Search Partners Quick Guide

This roadmap draft is intended as an example.

It should be tailored to the specific needs of the school in partnership with the incoming HOS.

Goals	Prior to Visit 1	Visit 1 Late winter	Between visits	Visit 2 Early spring	Between visits	Visit 3 Late spring	Following Visit 3
1. Make meaningful introductions to key stakeholders.	Setup	Meetings	Setup	Meetings	Setup	Meetings	Follow-up and additions

Spiraling meetings with: board members, administrators, faculty, staff, parents, local community leaders, education organizations in the region, and others as appropriate. Order them carefully and ensure all social expectations are met.

2. Share important information in a digestible and organized fashion.	Create knowledge base	Review some documents	Follow-up and additions	Review some documents	Follow-up and additions	Review some documents	Follow-up and additions
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Consider formal and informal information in all the areas covered by the Baldrige Performance Excellence Framework for Education.

3. Ensure a successful personal transition for the incoming HOS and their family.	Identify personal needs	Housing and social intros	Follow-up and refinement	Housing and social intros	Follow-up and refinement	Providers and social intros	Follow-up and refinement
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If the HOS's family can settle in smoothly and become successfully integrated socially, the Head of School will have more of his/her attention to focus on work and is more likely to serve the school for a longer period.

4. Excite the school and local community about the incoming HOS and the school.	Update and preview	Attend events	Update and preview	Attend events	Update and preview	Events and parlor meetings	Update and preview
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The transition committee will work with the school to keep the community informed and engaged in alignment with the school's brand messaging and existing communication strategy. During visits, attendance at school events, observance of school traditions, and parlor meetings serve to engage the community.

5. Begin drafting 90, 180, and 365-day goals for and with the incoming HOS.	Share strategic and other docs	Strategy review, discuss	Follow-up and refinement	Informal discussion	Follow-up and refinement	Preliminary discussion	Follow-up and refinement
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Specific, measurable, attainable, relevant, and timely (SMART) goals for the first 90 days will be finalized during the first 30 days of work. Work done during transition will prepare the head and the board to finalize the goals drafted prior to start of work.