



Early Career Heads Institute

Summer 2025

Welcome & Introductions

- Name
- School
- Entering Year ____
- Prior to Now
- Predictive Index Profile Type
- Excited | Curious or Uncertain



6 Dimensions of Effective Onboarding



Dimension 1

Personal Leadership Model





Personal Leadership Development



PREDICTIVE INDEX

CONNECT

Connect with what
I already know
about my
leadership?

EXTEND

Expand or push
my thinking
about my
leadership?

CHALLENGE

Challenges or
questions bring
up about my
leadership?





How do you predict behavior?

DRIVES ▷ **NEEDS** ▷ **BEHAVIORS**



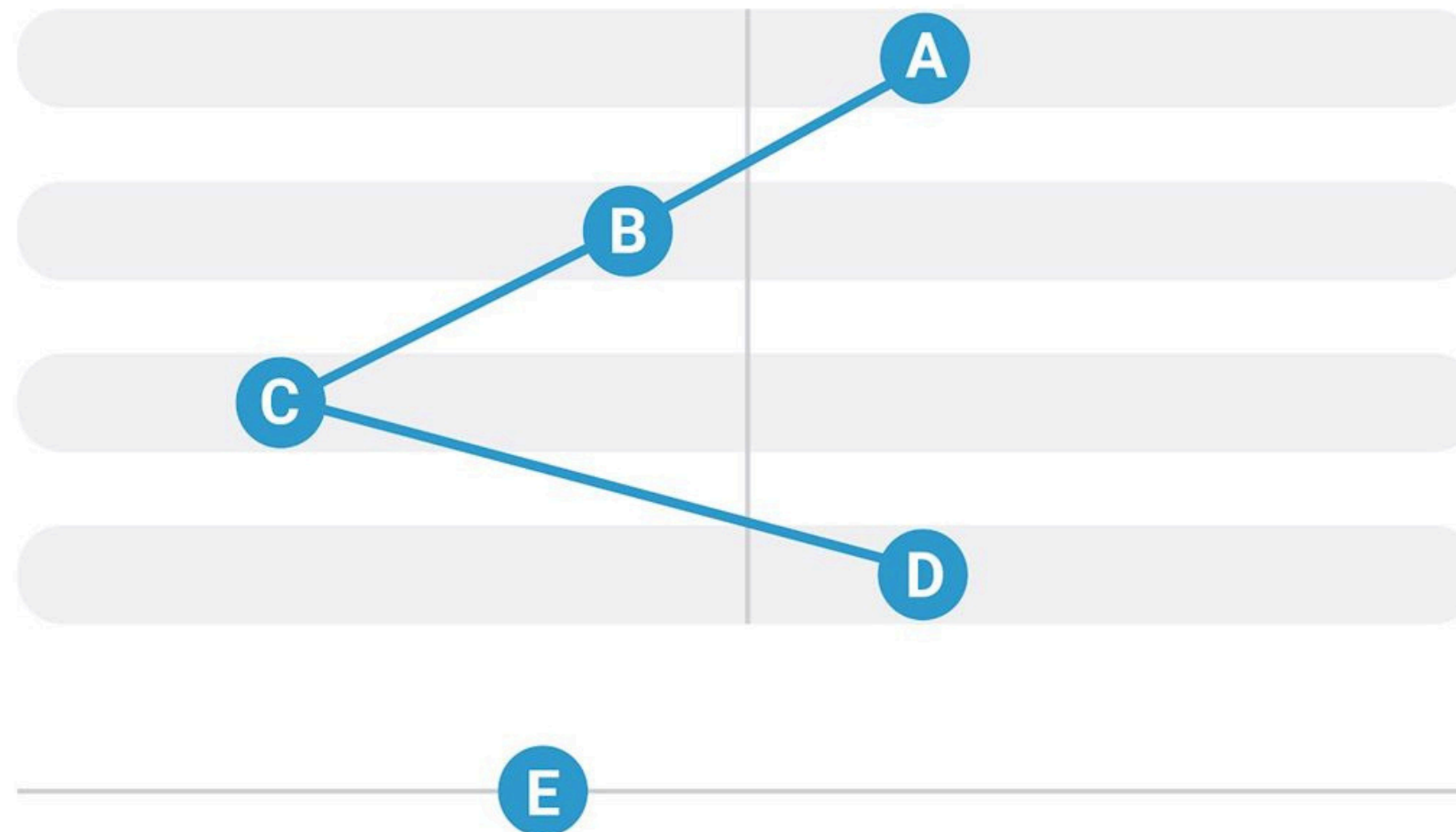
4 Factors

- Ⓐ **Dominance:** The drive to exert influence on people or events.
- Ⓑ **Extraversion:** The drive for social interaction with others.
- Ⓒ **Patience:** The drive to have consistency and stability.
- Ⓓ **Formality:** The drive to conform to rules and structure.



How your pattern is interpreted?

Factors and their drives



DOMINANCE

The drive to exert one's influence on people or events.

EXTRAVERSION

The drive for social interaction with other people.

PATIENCE

The drive for consistency and stability.

FORMALITY

The drive to conform to rules and structure.

OBJECTIVITY

The drive for objectivity in decision making.



PI's 17 Reference Profiles

Social



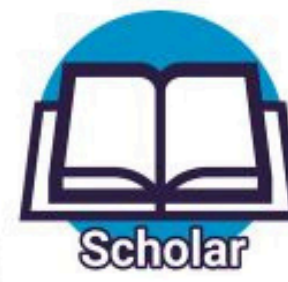
Analytical



Stabilizing



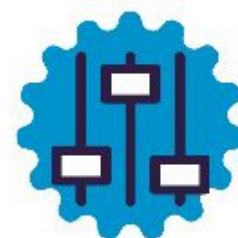
Persistent



Analytical Profiles $A > B$ with a Low C



Analyzer



Controller



Specialist



Strategist



Venturer

Social Profiles High B



Altruist



Captain



Collaborator



Maverick



Persuader



Promoter

Stabilizing Profiles Low A and Low B coupled with High C and High D



Adapter



Artisan



Guardian



Operator

Persistent Profiles $A > B$ coupled with a High C



Individualist



Scholar

PREDICTIVE INDEX

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Transition Traps

01

Sticking with what you know

You believe you will be successful in the new role by doing the same things you did in your previous role, only more so.

02

03



Transition Traps

01

Sticking with what you know

You believe you will be successful in the new role by doing the same things you did in your previous role, only more so.

02

Falling prey to the “action” imperative

You feel as if you need to take action, and you try too hard, too early to put your own stamp on the organization.

03



Transition Traps

01

Sticking with what you know

You believe you will be successful in the new role by doing the same things you did in your previous role, only more so.

02

Falling prey to the “action” imperative

You feel as if you need to take action, and you try too hard, too early to put your own stamp on the organization.

03

Setting unrealistic expectations

You may perform well but still fail to meet the expectations of your direct report and other key stakeholders.



Transition Traps

04

Attempting to do too much

You rush off in all directions, launching multiple initiatives in the hope that some will pay off.

05

06



Transition Traps

04

Attempting to do too much

You rush off in all directions, launching multiple initiatives in the hope that some will pay off.

05

Coming in with “the” answer

You come in with your mind made up, or you reach conclusions too quickly about “the” problems and “the” solutions.

06



Transition Traps

04

Attempting to do too much

You rush off in all directions, launching multiple initiatives in the hope that some will pay off.

05

Coming in with “the” answer

You come in with your mind made up, or you reach conclusions too quickly about “the” problems and “the” solutions.

06

Engaging in the wrong type of learning

You spend too much time focused on learning about the technical part of business and not enough about the cultural and political dimensions of the role.



POLARITY

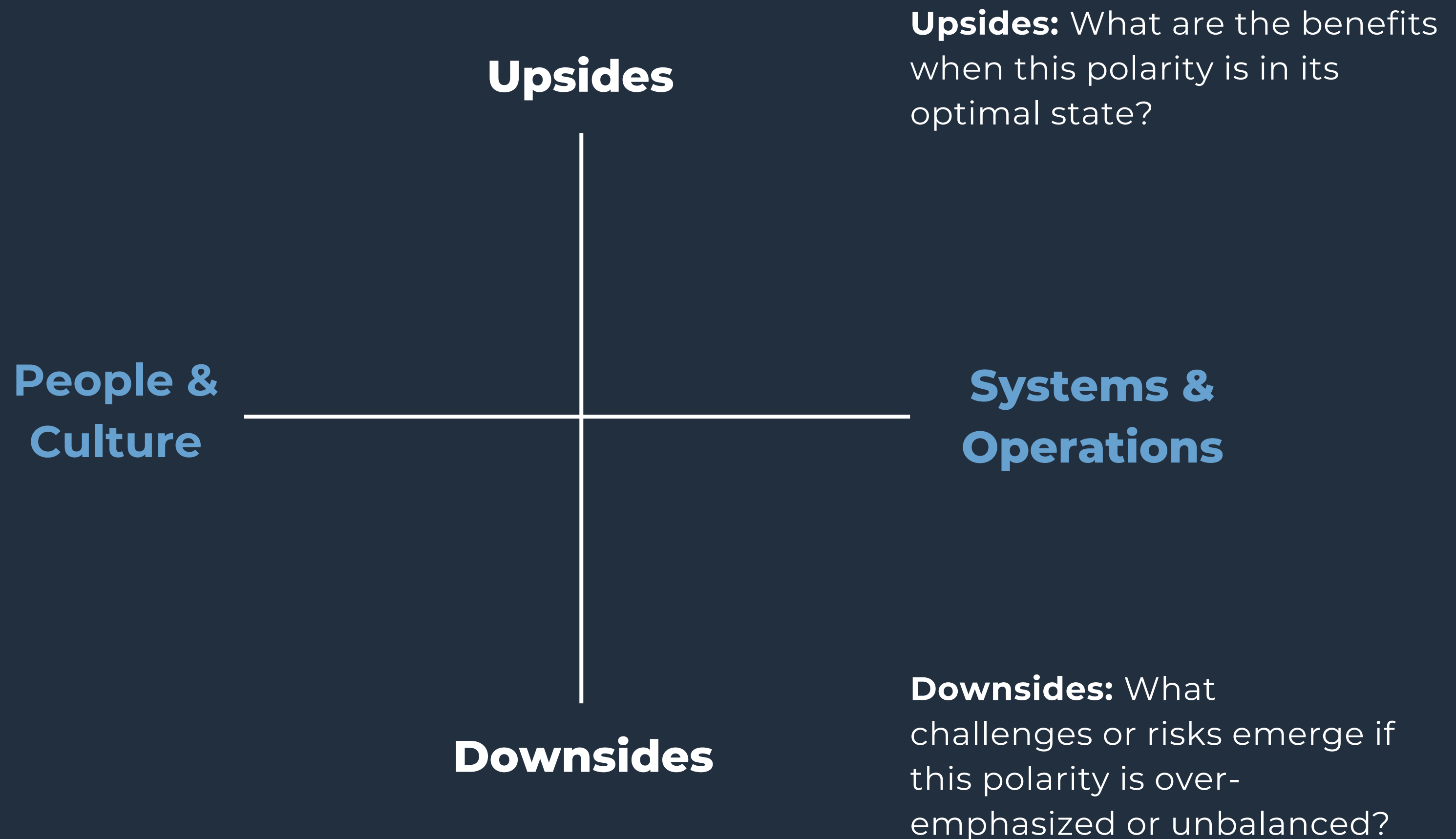
“An interdependent pair of values or perspectives that appear to be opposites, but actually need each other over time to function well.”

-Barry Johnson,
Polarity Management

Key Features of a Polarity

- Ongoing and unsolvable (you don't "fix" a polarity)
- Interdependent (you can't optimize one without considering the other)
- Each pole has benefits and liabilities
- Over-focusing on one side creates negative consequences
- Must be managed over time, not resolved once







Personal Working Norms



Personal Working Norms

Driver 01

Priorities

- Do you fully understand your mandates?



Personal Working Norms

Driver 01

Priorities

- Do you fully understand your mandates?

Driver 02

Role

- Are you focused on the work that only you can do?
- Are you creating positive leverage to get work done?
- Who has your back?



Personal Working Norms

Driver 01

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- Do you fully understand your mandates?

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Driver 03

Time

- What rhythm have you established to manage your time?
- How can you redesign meetings for maximum impact?



What are the **top 5** challenges you are confronting within your school community? Choose up to five.

2025

2024

1

annual fund & capital
campaign support - 47.4%

retention & recruitment of
qualified staff - 51.8%

2

balancing daily demands
with strategy - 44.6%

annual fund & capital
campaign support - 49.2%

3

retention & recruitment of
qualified staff - 42.9%

balancing daily demands
with strategy - 42.9%

4

tuition & affordability -
30.9%

tuition & affordability -
38.2%

5

deferred facility maintenance
projects - 24.0%

deferred facility maintenance
projects - 31.4%



Personal Working Norms

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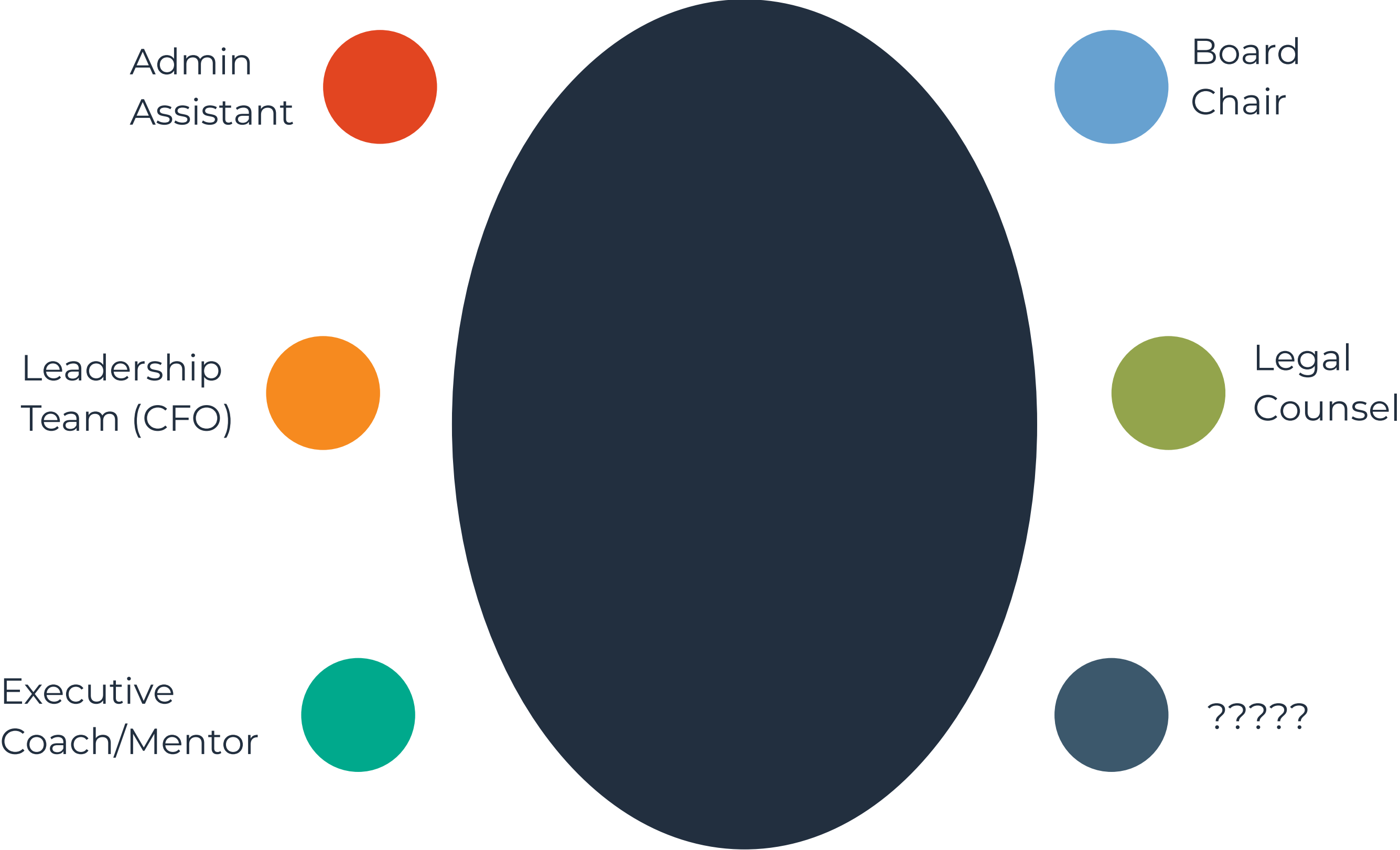
Driver 04

Energy

- How do you protect your health in a demanding role?
- Who are your real friends?
- Why does this work matter to you?



Support Structure





Early Career Heads Institute

Summer 2025



Personal Leadership Development





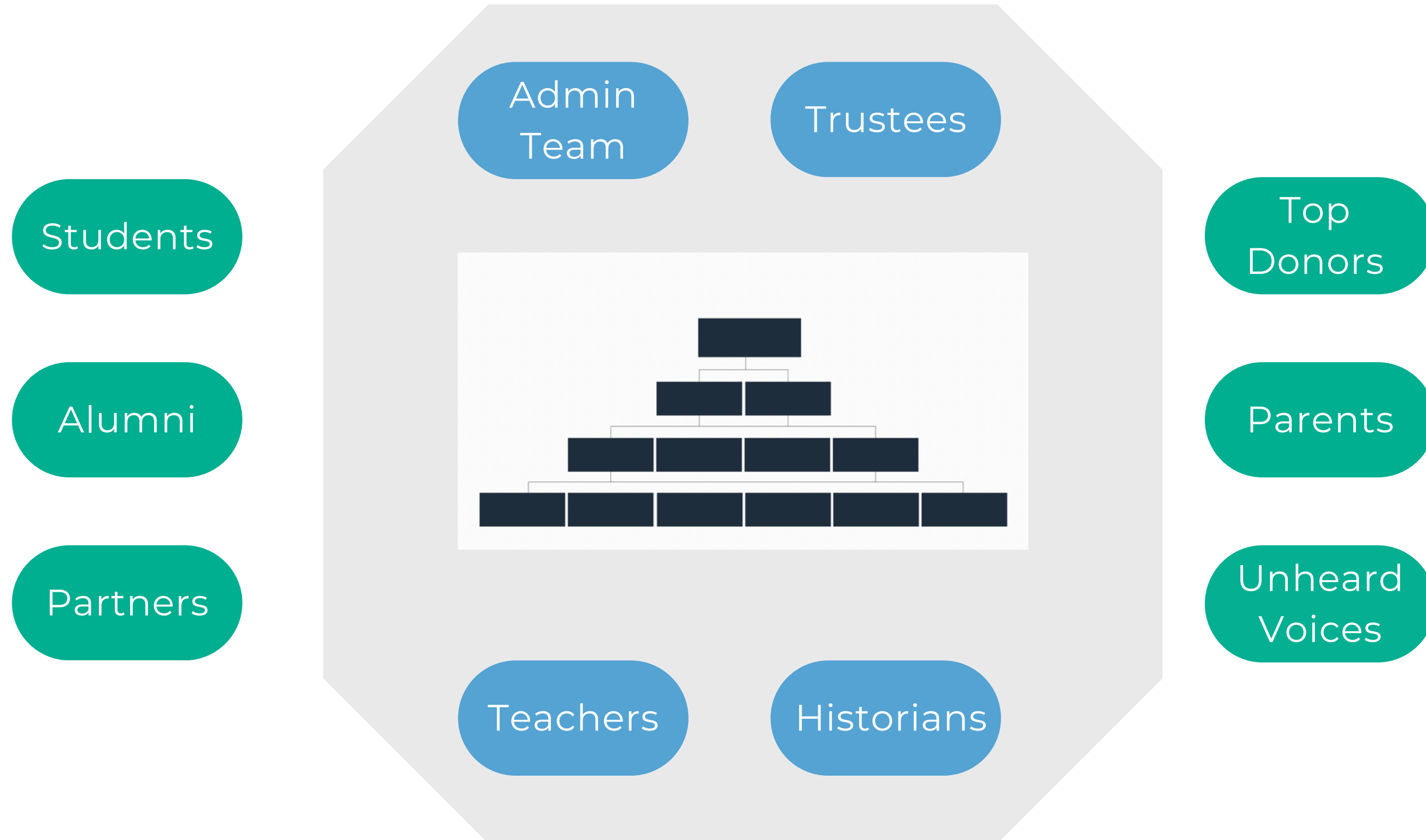
Personal Working Norms





Learning Plan

Best Sources of Insight



Questions about the Past

Performance

- How has the org performed in the past? How do people in the org think it has performed?
- How were goals set? Were they sufficiently or overly ambitious?
- What measures were employed? What behaviors did they encourage or discourage?
- What happened if goals were not met?

Root Causes

- If performance was good, why has that been the case?
- What have been the relative contributions of strategy, structure, systems, talent bases, culture, and politics?
- If performance had been poor, why has that been the case? Do the primary issues reside in the orgs strategy?

History of Change

- What efforts have been made to change the org?
- Who has been instrumental in shaping this org?



Questions about the Present

Vision & Strategy

- What is the stated vision and strategy?
- Is the org really pursuing that strategy? If not, why not? If so, will the strategy take the org where it needs to go?

People

- Who is capable, and who is not?
- Who is trustworthy, and who is not?
- Who has influence, and why?

Processes

- What are the key processes?
- Are they performing acceptably in quality, reliability, and timeliness? If not, why not?

Land Mines

- What lurking surprises could detonate and push you offtrack?
- What potentially cultural or political missteps to avoid?

Early Wins

- In what areas (people, relationships, processes, or products) can you achieve some early wins?



Questions about the Future

Challenges & Opportunities

- In what areas is the org most likely to face stiff challenges in the coming year? What can be done right now to prepare for them?
- What are the most promising unexploited opportunities? What would need to happen to realize their potential?

Barriers & Resources

- What are the most formidable barriers to making needed changes? Are they technical? Cultural? Political?
- Are there islands of excellence or other high-quality resources that you can leverage?
- What new capabilities need to be developed or acquired?

Culture

- Which elements of the culture should be preserved?
- Which elements need to change?



5 Questions

1

2

3

4

5



Derrick's 5 Questions

1

Tell me about your family.

2

Why (and when) did you come to Ravenscroft and why did you stay?

3

What is one thing Ravenscroft must keep? To let go? A dream?

4

If you were head of school for a day, what would you change immediately?

5

Where do you see yourself in 5 years?



5 Questions

1

2

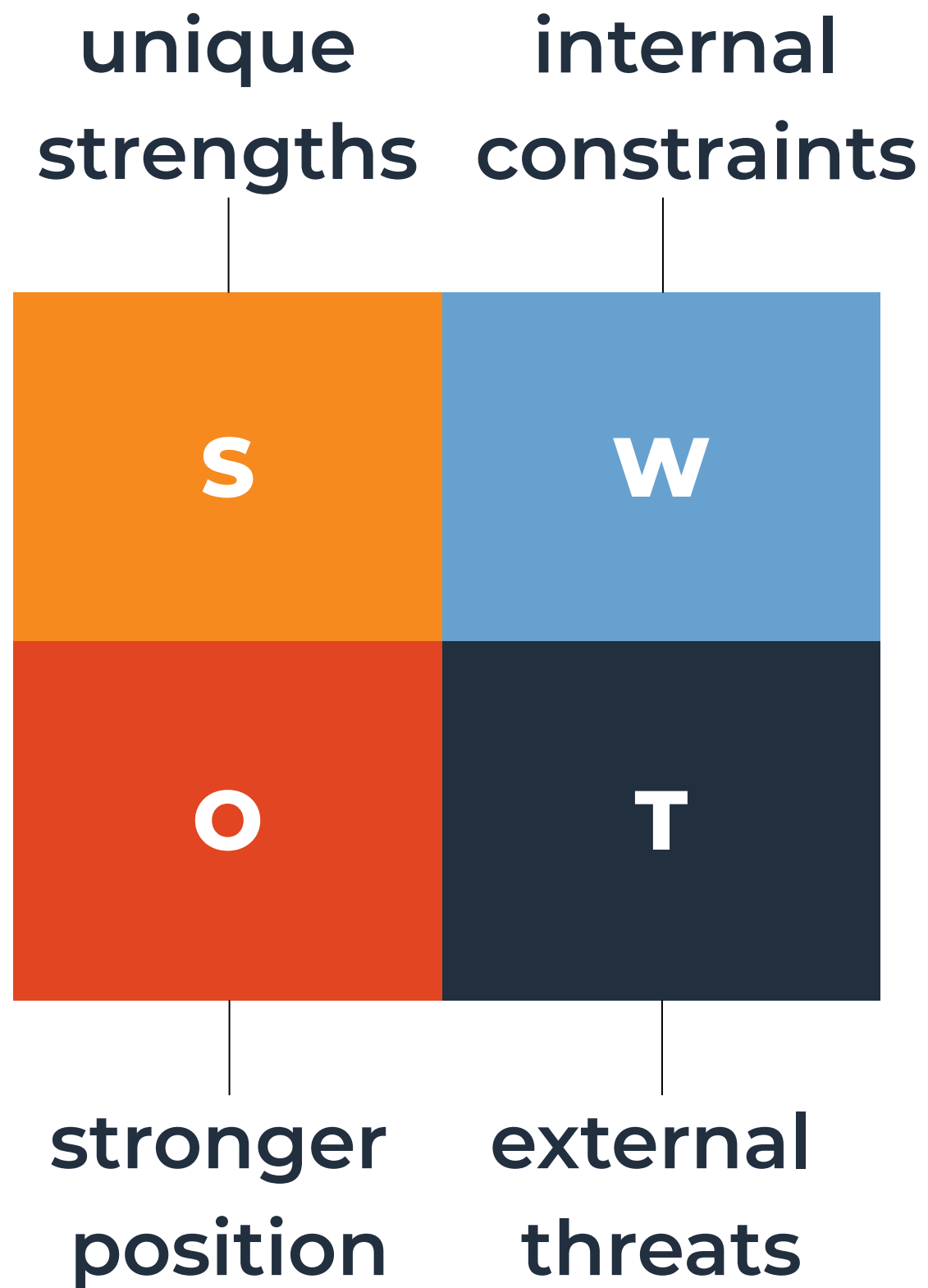
3

4

5



SWOT Analysis



Reflection



Dimension 2

Team Development & Processes



Team Agreements

A **team agreement** is a collaboratively developed set of norms, expectations, and guiding principles that outline how a team will work together. It typically covers behaviors, communication styles, decision-making processes, conflict resolution, accountability, and meeting structures. The goal is to foster trust, clarity, and alignment by making implicit assumptions explicit.

Key elements often include:

- Shared purpose – why the team exists
- Roles and responsibilities – who does what
- Communication norms – how and when the team communicates
- Decision-making processes – how decisions are made and by whom
- Accountability measures – how the team holds itself responsible
- Conflict resolution – how the team addresses disagreement



Cadence of Connection

Cadence	Meeting Type	Focus
Weekly	Tactical	Priorities, quick updates
Monthly	Strategic	Progress on goals, data, decisions
Quarterly	Learning/Reflection	What's working, what needs adjusting
Annually	Vision/Goal Setting	Planning, retreat, realignment



5-15 Check-In

Answer 5 questions,
no more than
15 minutes

1

Accomplishments for week (month, quarter)?

2

Priorities for next week (month, quarter)?

3

Current challenges or roadblocks within your role, team, organization?

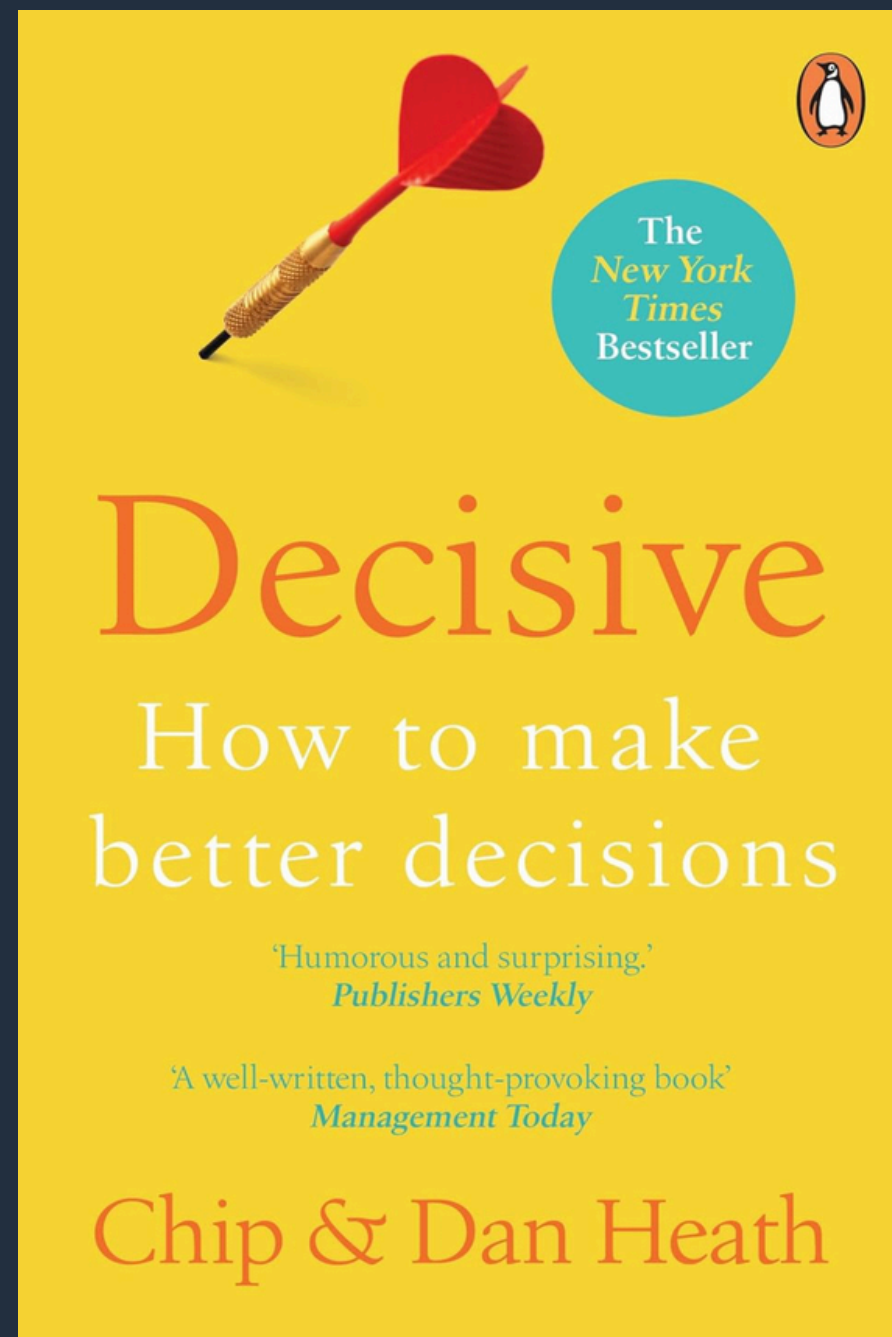
4

Lessons learned and opportunities for growth?

5

Well-being check: How are you?





“When people have the opportunity to collect information from the world, they are more likely to select information that supports their preexisting attitudes, beliefs, and actions.”



WRAP YOUR DECISIONS

W: Widen Your Options	What other options haven't we considered? Who else might offer a fresh take?
R: Reality-Test Your Assumptions	What would convince me this option is wrong? What data or feedback could I gather?
A: Attain Distance Before Deciding	What would I advise a friend to do? How will I feel about this decision in 10 months?
P: Prepare to Be Wrong	What could go wrong? What's our backup? What will we track to know if it's working?





Reflection

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Dimension 3

Board Effectiveness

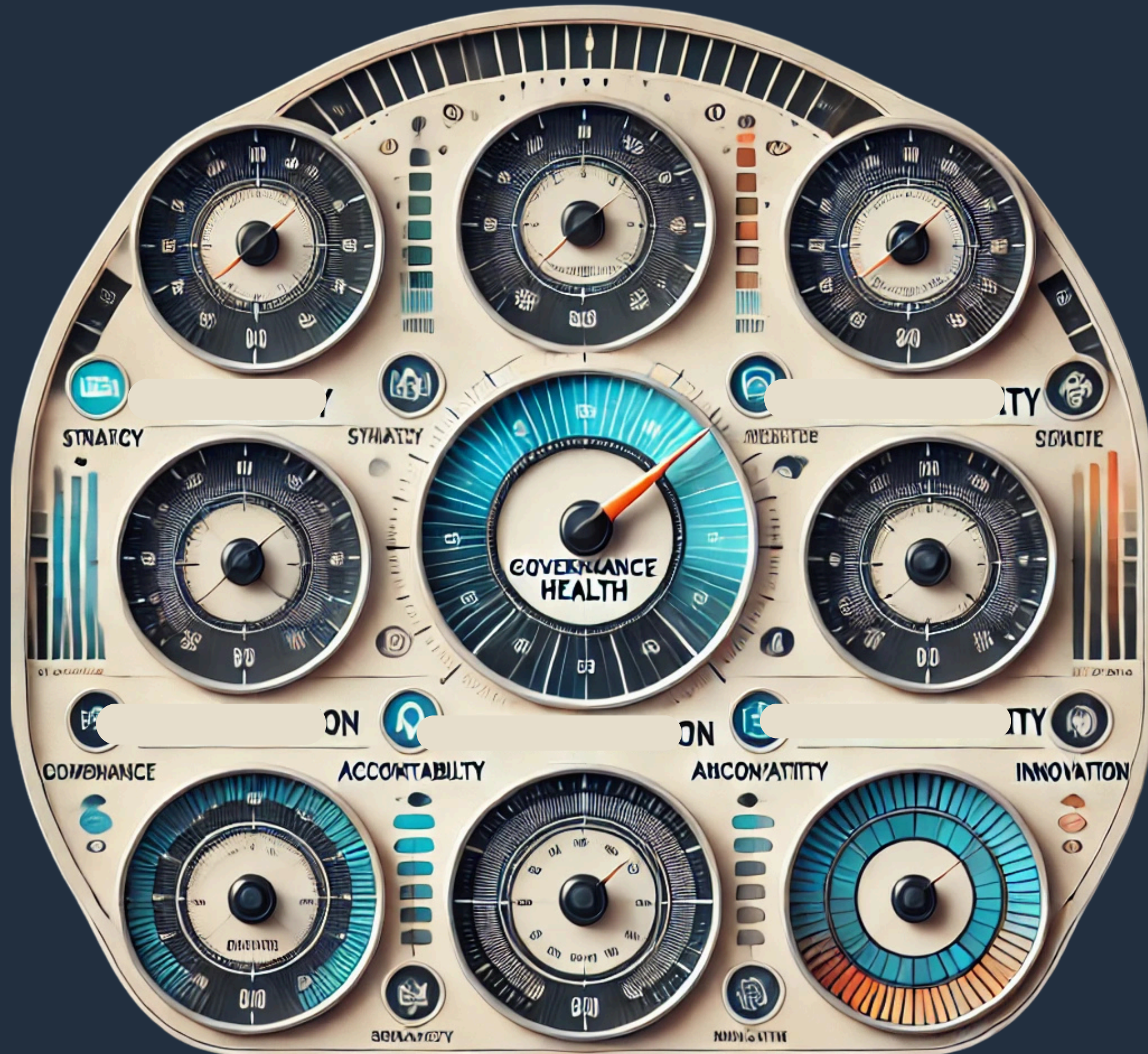


Chart outlining trustee roles, meeting cadence, and relationship-building goals

Relationship Goals	Audience	Focus	Sample Actions
Board Chair	Strategic thought partner	Set tone for transparency, communication, support	Weekly check-ins, shared annual calendar, alignment on priorities
Individual Trustees	Engagement and insight	Understand background, interest areas, strengths	1:1s in first 90 days; invite to school events
Committee Chairs	Alignment and empowerment	Equip for leading strong committee discussions	Prep materials in advance, clarify role in governance
New Trustees	Onboarding & mission alignment	Introduce school culture, strategic priorities	Host welcome coffee, pair with mentor, provide orientation kit



GOVERNANCE HEALTH INDEX



Governance Competencies



Collaborative Leadership



Community Engagement



Strategic Direction



Talent Cultivation



Shared Accountability



Adaptive Innovation



Governance Competencies



01

Collaborative Leadership

The leadership partnership that ensures clear governance delineation, aligns resources and policies, and maintains operational coherence to support the school’s mission, vision, and long-term sustainability

Head of School

- Oversees the management of staff, programming, facilities and resource allocation
- Establishes transparent communication channels and decision-making processes with the board
- Leads the community through transitions by leveraging the expertise of trustees and operational teams

Board of Trustees

- Selects head and defers management of operations
- Sets the conditions for ethical governance, ensuring systems support head and strategic & operational priorities
- Partners with head to oversee strategic targets, financial planning & investments, and major policy decisions

Reflection Tool:

- Disconnected: Head and board operate in silos, with weak communication and misalignment of resources
- Developing: Basic governance structures exist, but gaps are evident in resource alignment
- Coordinated: Governance roles are well-defined, communication is strong, and resource allocation mostly supports strategic priorities
- Optimized: Head and board work as a high-trust partnership where resources and operations fully support strategic execution



Questions

- Are board and head roles clearly defined and mutually respected?
- How effective and transparent is communication between the board and head?
- How do we ensure trust, alignment, and shared leadership?
- Do our meeting agendas balance oversight and strategic dialogue?
- How do we prepare and support the board chair and committee leaders?
- Are we modeling ethical governance practices (conflict of interest, confidentiality, unity of voice)?



Topics

- Role and responsibilities of the Executive Committee
- Use of consent agendas for efficiency
- Purpose and protocols of executive sessions
- Board-chair/head partnership practices
- Clear delineation between governance and management
- Norms for communication between board and head
- Unified voice and confidentiality expectations
- Role clarity in policy establishment (board vs. head)
- Onboarding and mentoring new trustees



Scenario

A challenging incident involving a student on campus became public, prompting strong reactions from the community. After sharing incident with Executive Committee, the head of school quickly communicated with parents and staff, but some trustees felt left out of the response strategy. This lack of coordination led to mixed messaging, further escalating tensions. A few trustees began fielding complaints directly from parents, bypassing the head, which created confusion about roles. Trust between the board and the head has weakened, with both sides feeling unsupported.

- Who are the characters in the scenario?
- What are the governance issues in the scenario?
- What are questions to address?



Governance Competencies



02

Community Engagement

The cultivation of meaningful relationships with internal community members and external partners, strengthening the school's mission and advancing strategic priorities

Head of School

- Supports community to foster a positive school culture and a strong sense of belonging & connection
- Articulates the school's mission and vision to community and engages them in fulfillment of strategic priorities
- Represents the school at community events and with external partners

Board of Trustees

- Serves as ambassadors of the school's mission and values in cultivation of community relationships
- Extends the school's network of partnerships to advance strategic priorities
- Participates in and advocates for fundraising and development initiatives

Reflection Tool:

- Isolated: No evidence of engagement
- Aware: Basic efforts to engage key community members are underway but lacks meaningful interaction
- Involved: Regular engagement with stakeholders is established and input is solicited
- Connected: Strong relationships drive trust and mutual support and enhance the school's brand reputation



Governance Competencies



03

Strategic Direction

The ability to design, communicate, and coalesce community around the school’s mission, vision, and strategic priorities to ensure cohesive goal-setting, planning, execution, and oversight

Head of School

- Partners with board in designing school’s strategic targets
- Translates targets into actionable objectives for internal teams
- Leads operational alignment of community around strategic priorities

Board of Trustees

- Establishes the school’s mission and adopts the long-range vision
- Approves and monitors the fulfillment of strategic targets
- Ensures strategic alignment across all governance decisions

Reflection Tool:

- Undefined: Board and head struggle to articulate how current initiatives align with the school’s mission
- Emerging: Basic understanding of strategic priorities; alignment is inconsistent
- Aligned: Vision and priorities are clearly articulated and mostly aligned
- Integrated: Strategic priorities are fully embedded in decision-making processes



Governance Competencies



04

Talent Cultivation

The process of recruiting and developing high-performing professionals that align with the school's mission, vision, and values

Head of School

- Recruits and retains a high performing and mission-driven faculty and staff with the expertise and diversity of skillsets & backgrounds
- Fosters a learning culture at all levels knowledge and skills
- Orients team to improve programs, adapt to changes, and advance strategic priorities

Board of Trustees

- Recruits and retains high performing and mission-driven trustees with the expertise and diversity of skillsets & backgrounds necessary
- Provides on-going leadership development of trustees that align with mission, strategic priorities, and ethical governance practices
- Prioritizes the development of head through coaching and mentorship

Reflection Tool:

- Underdeveloped: Lack of focus on growth or recruitment
- Limited: Minimal investment in talent development
- Emerging: Initial steps to recruit and develop talent are in place
- Empowering: Exceptional talent pipelines drive organizational excellence



Governance Competencies



05

Shared Accountability

An interdependent relationship where the head and board collectively uphold responsibilities, monitor performance, and ensure progress toward strategic targets

Head of School

- Reports school progress and pain points to the board
- Demonstrates impact on strategic priorities and objectives
- Ensures compliance with accreditation standards and legal requirements

Board of Trustees

- Partners with the head to develop shared goals
- Monitors organizational health, progress towards strategic targets, and compliance with accreditation standards and legal requirements
- Evaluates head and itself on a consistent basis through the lens of governance competencies and shared goals

Reflection Tool

- Fragmented: Expectations for shared accountability are unclear or ignored
- Developing: Basic accountability structures are in place but lacks consistency
- Consistent: Board regularly monitors organizational health
- Dynamic: Accountability is shared and drives measurable progress



Governance Competencies



06

Adaptive Innovation

A commitment to ongoing learning, goal-setting, and planning to innovate and adapt to an evolving educational landscape

Head of School

- Collaborates with board to monitor the macro and micro trends impacting education
- Leads staff in study of the latest research and evidence-based programs and practices
- Provides professional development opportunities to implement mission-driven strategic priorities

Board of Trustees

- Partners with head to develop a vision for long-term innovation and ensure the school remains responsive to emerging trends and challenges
- Evaluates the school's strengths, weaknesses, opportunities, risks to inform strategic decision-making
- Approves investments in innovation for long-term sustainability

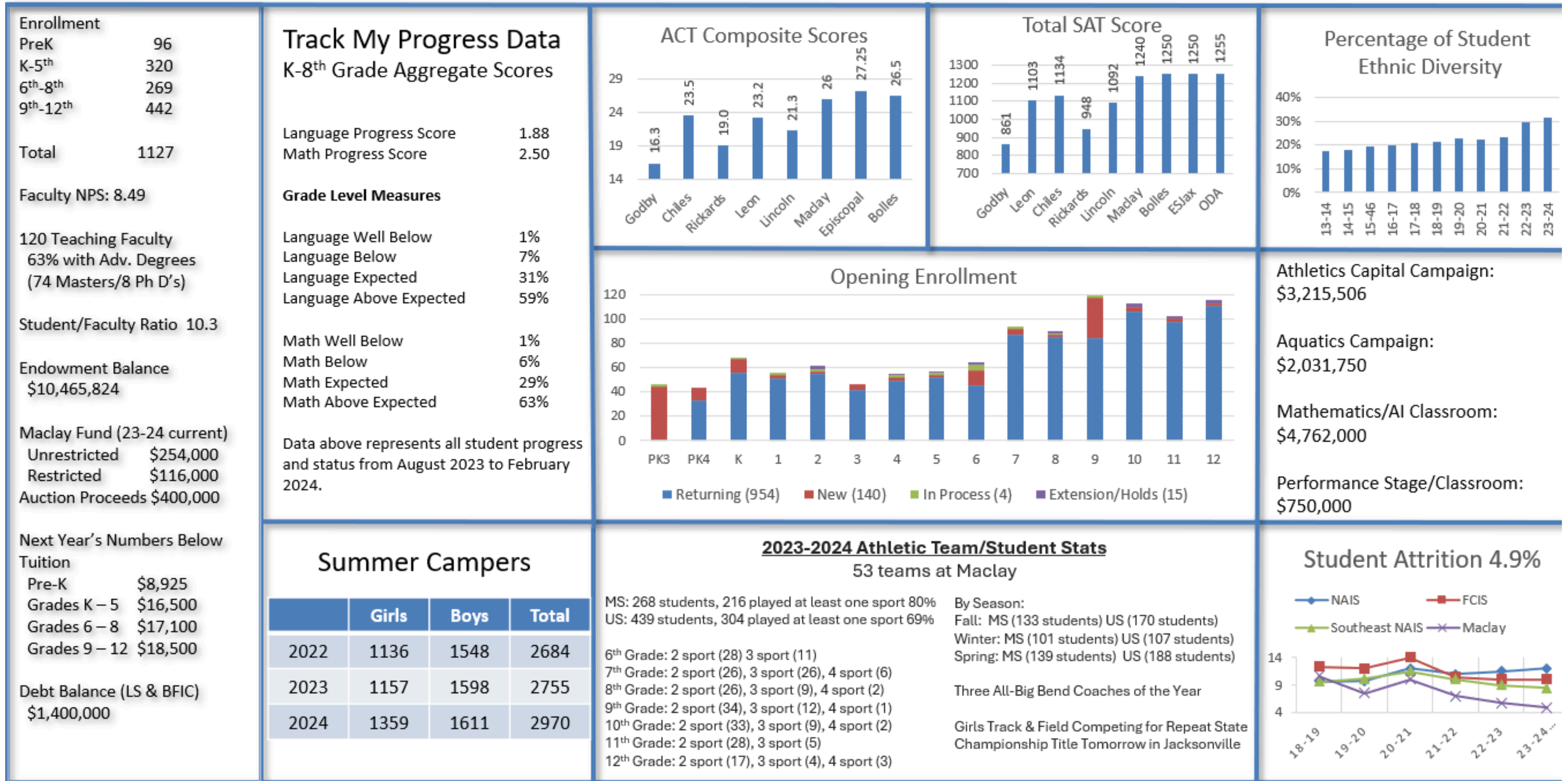
Reflection Tool:

- Static: School avoids implementing new programs or revisiting outdated practices
- Reactive: Adapts to changes when necessary but lacks forward planning
- Proactive: Initiates learning and adapts to trends with some consistency
- Innovative: Embraces continuous improvement and leads in adaptation



MacLay Board of Trustee Dashboard 2024

5/13/2024





Reflection



Dimension 4

Mission-Driven Strategy



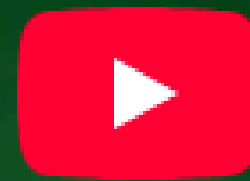


A Plan Is Not a Strategy

QUICK STUDY: **A Plan Is Not a Strategy**



Share



Harvard
Business
Review

Watch on  YouTube



Start-Up

Turnaround

Accelerated
Growth

Realignment

Sustaining
Success

STARS Model

Watkins, The First 90 Days



Start-Up

Turnaround

Accelerated
Growth

Realignment

Sustaining
Success

Assembling the capabilities (people, financing, and technology) to get a new business or initiative off the ground



Start-Up

Turnaround

Accelerated
Growth

Realignment

Sustaining
Success

**Saving a business or initiative widely
acknowledged to be in serious trouble**



Start-Up

Turnaround

Accelerated
Growth

Realignment

Sustaining
Success

Managing a rapidly expanding business



Start-Up

Turnaround

Accelerated
Growth

Realignment

Sustaining
Success

**Reenergizing a previously successful
organization that now faces problems**



Start-Up

Turnaround

Accelerated
Growth

Realignment

Sustaining
Success

**Preserving the vitality of a successful
organization and taking it to the next level**





Reflection



Dimension 5

Organizational Alignment

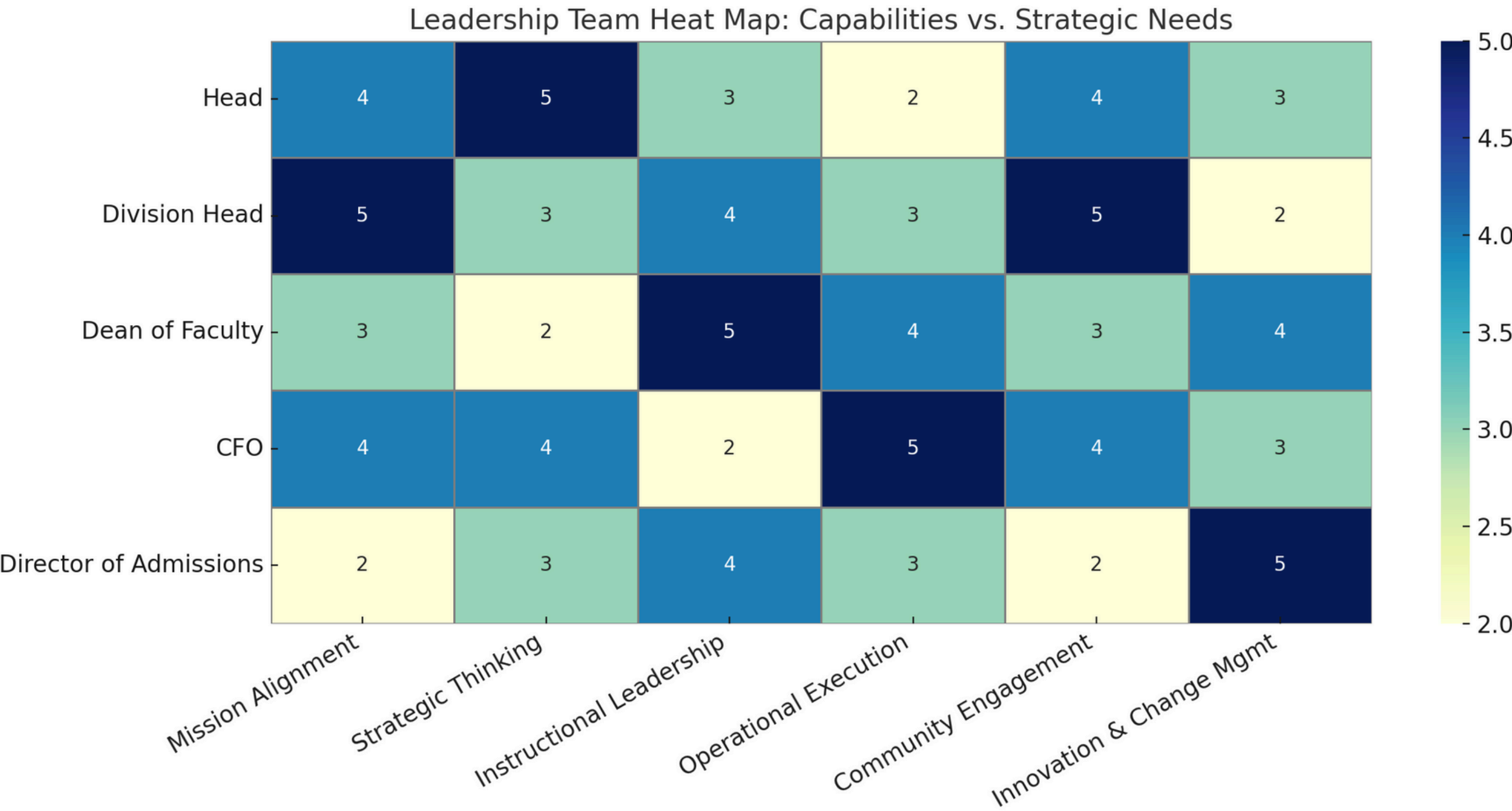




Assessing Talent



Assessing Leadership: Heat Map



9-Box Talent Grid

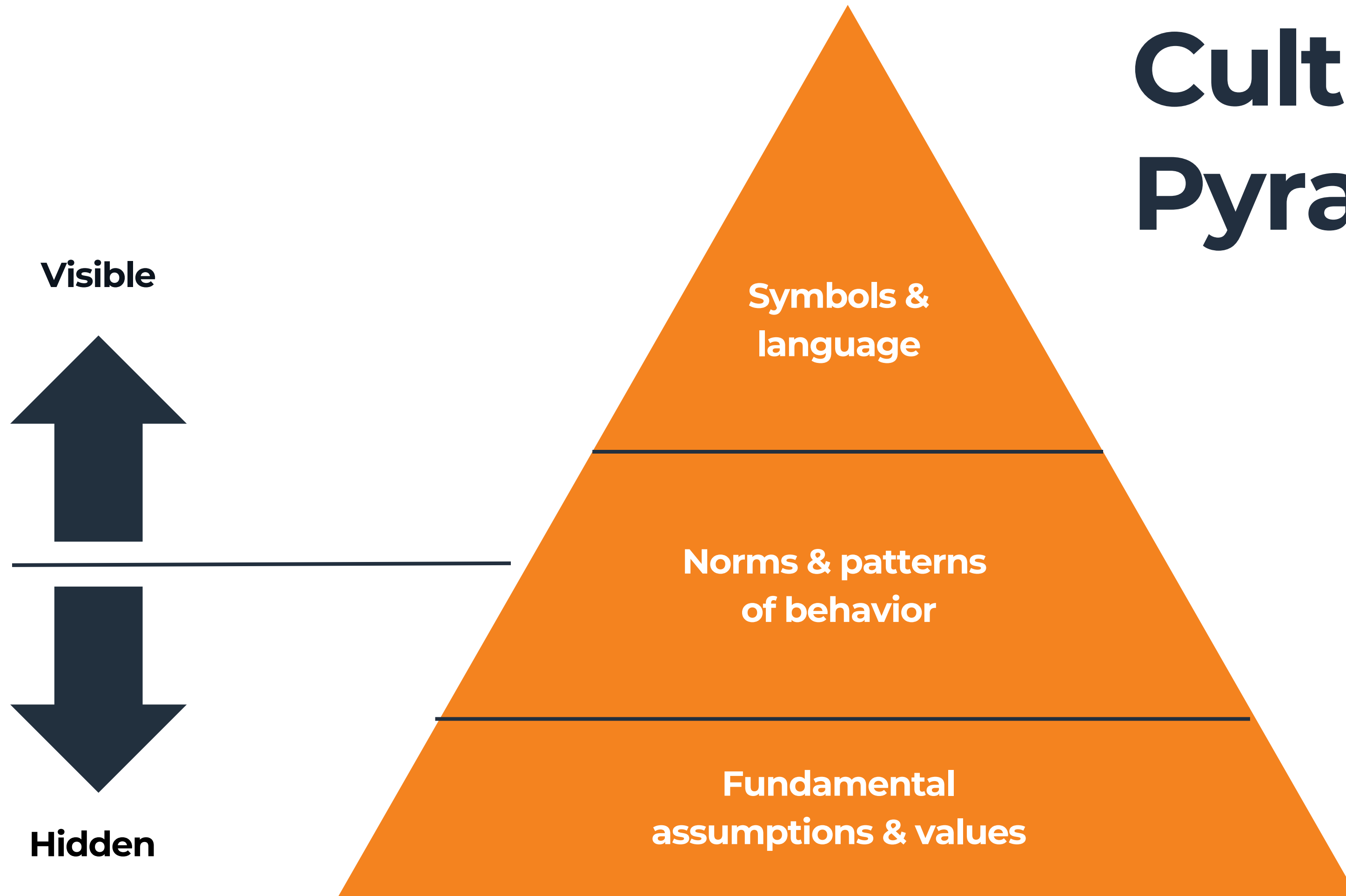
	High Potential	Medium Potential	Low Potential
High Performance	<i>Future Leader</i> ✨ Stretch, retain, groom for promotion	<i>Core Player</i> ✅ Retain and support	<i>Specialist</i> 🎯 Valued in current role
Medium Performance	<i>Emerging Star</i> ⌚ Coach for readiness	<i>Steady Performer</i> ⚖️ Provide development	<i>Watch Zone</i> 👁️ Clarify expectations
Low Performance	<i>Misaligned Talent</i> 🔄 Reassign or exit	<i>Underperforming Potential</i> ❗ High support or transition	<i>Exit Risk</i> ⚠️ Immediate performance plan or removal





Assessing Culture

Cultural Pyramid





Assessing Business Orientation





Reflection

A large, empty rounded rectangle with a thin dark blue border, intended for a reflection or notes.

Dimension 6

Community Engagement



**Help me fulfill my
child's potential in
a values-aligned
community**

**Help me help
my child
overcome
obstacles**

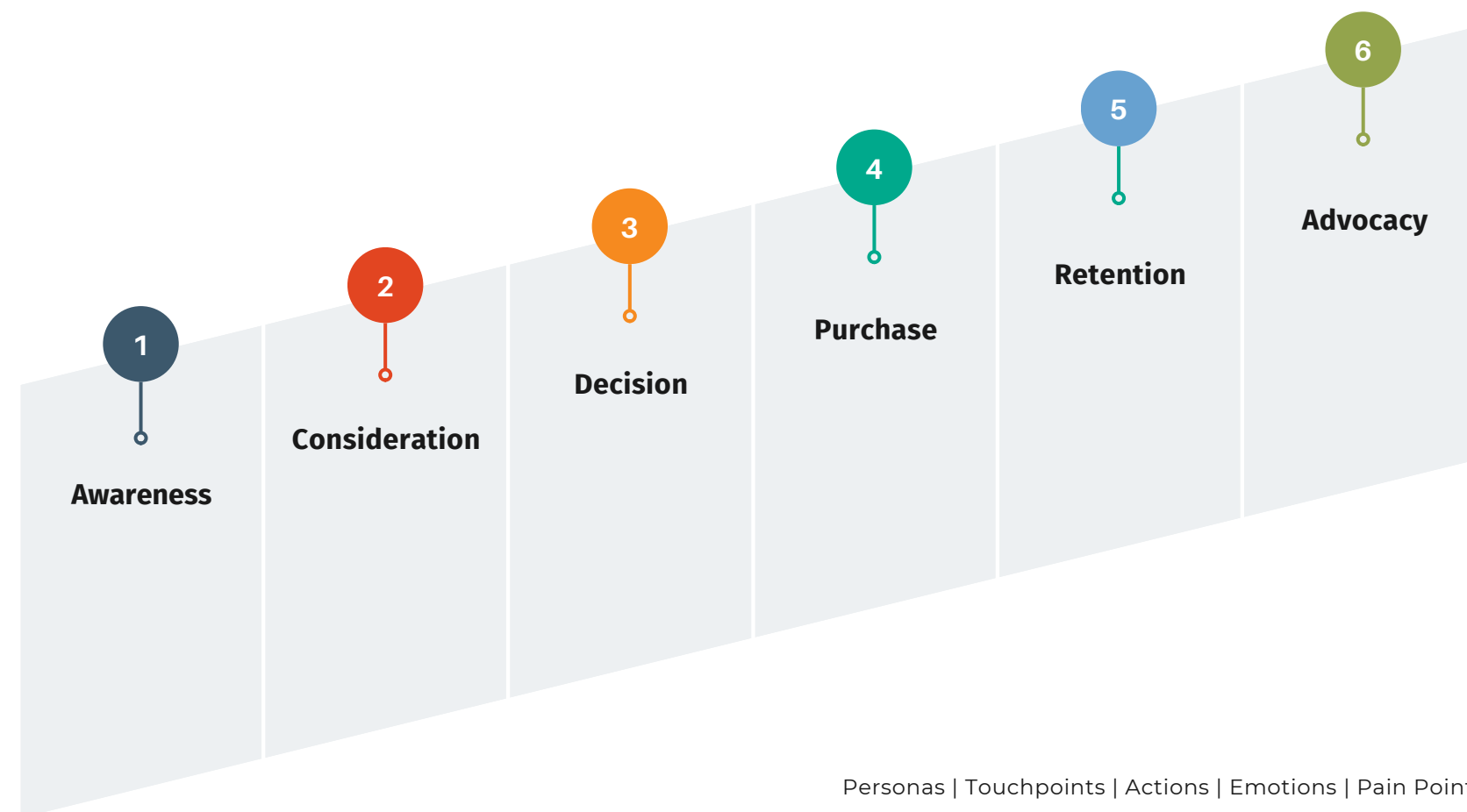
**Help me develop
a well-rounded
peson who will
impact the world**

**Help me
realize my
plan for my
talented
child**

Jobs-To-Be-Done



MAP THE JOURNEY





Reflection

A large, empty rounded rectangle with a thin blue border, intended for handwritten or typed reflection notes.

Dear Me

Prompts to guide writing:

- What do I want to stay grounded in over the next 90 days?
- What will success look like—beyond metrics?
- What advice would I offer myself when things feel uncertain?
- What matters most in building trust and momentum?
- What did I learn this week that I never want to forget?
- How will I lead both through change and with authenticity?

Option to frame the letter with:

- “Here’s what I want to carry forward...”
- “When it gets hard, remember...”
- “Trust yourself to...”
- “My leadership will be defined by...”



Early Career Heads Institute

Summer 2025

Upsides

Upsides: What are the benefits when this polarity is in its optimal state?

**People &
Culture**

**Systems &
Operations**

Downsides

Downsides: What challenges or risks emerge if this polarity is over-emphasized or unbalanced?



Upsides

Upsides: What are the benefits when this polarity is in its optimal state?

- Strong relationships and trust
- mission alignment
- safe, responsive environment

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**Systems &
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- safe, responsive environment

- clear processes and roles
- efficiency & consistency
- strong execution on priorities

**People &
Culture**

**Systems &
Operations**

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People & Culture

Systems & Operations

- lack of structure or accountability
- emotional exhaustion
- unclear decision-making

Downsides

Downsides: What challenges or risks emerge if this polarity is over-emphasized or unbalanced?



Upsides

Upsides: What are the benefits when this polarity is in its optimal state?

- Strong relationships and trust
- mission alignment
- safe, responsive environment

- clear processes and roles
- efficiency & consistency
- strong execution on priorities

People & Culture

Systems & Operations

- lack of structure or accountability
- emotional exhaustion
- unclear decision-making

- culture feels transactional
- high turnover or disengagement
- voices not heard

Downsides

Downsides: What challenges or risks emerge if this polarity is over-emphasized or unbalanced?



ACTION STEPS

People & Culture

- schedule time to connect intentionally, not consistently
- use listening tours to build relationships
- clarify role

Systems & Operations

- assess key systems
- audit redundancy, gaps
- create dashboards for clarity



Personal Working Norms

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Priorities

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Driver 02

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Driver 03

Time

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Driver 04

Energy

- How do you protect your health in a demanding role?
- Who are your real friends?
- Why does this work matter to you?



6 Dimensions of Effective Onboarding



90 Day Plan for the Ravenscroft Board Chair

The purpose of this document is to lay out the priorities, goals, and milestones for my first 90 days as the Head of School at Ravenscroft. According to Michale Watkins, the author of the book *The First 90 Days: Critical Success Strategies for New Leaders at All Levels*, the first 90 days of any leader's tenure can be a critical time as they "are most vulnerable because they lack detailed knowledge of the challenges they face and what it will take to succeed in meeting them." The summary plan laid out here is, in the most general sense, meant to provide a path to building credibility and secure some early wins—both which help provide *momentum* for future work once I am considered established in the role.

It is my intention that this document helps us, as partners, agree on:

1. Realistic expectations
2. Reach consensus on the business situation
3. Secure resources for early wins or larger strategic pieces

Block	Priorities	Goals	Milestones
30 days	Learning and building credibility	<ul style="list-style-type: none"> Initial diagnosis of situation Tour all facilities ID key priorities Decide early wins 	<ul style="list-style-type: none"> Draft HOS goals established All market study data submitted to ISA Complete 1:1 meetings with 12 month staff
30-60 days	Continue learning and building credibility Successful school opening	<ul style="list-style-type: none"> Plan for early wins Finalize team norms Establish basic expectations for employees 	<ul style="list-style-type: none"> Finalize HOS goals Opening week of school First BOT meeting First constituent group meetings Complete 1/3 of 1:1 employee meetings Site visit by Ian Symmonds (Sep 4)
60-90 days	Continue learning and building credibility Diagnosis complete	<ul style="list-style-type: none"> Assess senior team structure & function Assess departments Assess key systems 	<ul style="list-style-type: none"> First BOT committee meetings Complete 2/3 of 1:1 employee meetings Market study complete