

## TOOL BOX

### STRATEGIC THINKING ABOUT LEADERSHIP TRANSITIONS

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We have integrated three critical dashboards to help shape Board of Trustee thinking about institutional needs in anticipation of a Leadership Transition.

Begin with the Institutional Sustainability Dashboard, followed by the High Vulnerability/High Future Impact Dashboard to see at a glance the board's role in mitigating the vulnerabilities. Finally, consider the Experiential Criteria Dashboard to

inform the rating and ranking of the various leadership experience factors in the successful candidate.

A honest assessment of the vulnerabilities a school is facing will only help strengthen the institution prior to a change of top leadership, but will also help you manage a successful leadership transition and onboarding of the successful candidate.

<b>Sector Expertise</b>	<b>People Management</b>	<b>Leadership Scale</b>	<b>Strategic Growth</b>	<b>Financial Acumen</b>	<b>Operational Excellence</b>
Higher education, pre-collegiate, independent school, boarding, single sex, size and grade levels	Recruiting, developing and retaining top talent, board relationships, stakeholder relationships	Organizational size, type, and complexity, 'head of school' presence, external credibility	Budget, staff, capital campaign, physical plant, endowment, global awareness	Financial sophistication	Ability to achieve excellence in service delivery, industry best practices, and continuous improvement

#### Key Experiential Criteria

Sustainability Audit: Today's Top Institutional Vulnerabilities with Highest Future Impact

	What is the essential question about this vulnerability?	What are the implications of this vulnerability?	What should be the board's priority strategy to mitigate against this vulnerability?	What should be the board's goal with regard to this vulnerability?
Primary Vulnerability				
Secondary Vulnerability				
Tertiary Vulnerability				