

## **Preparing for Transition: Planning for a Head-of-School Succession**

Among Christian school organizations, there is a shared concern that, without preparation, Christian schools may face a shortage of qualified leaders within the next decade. At present, the average age of Christian school leaders is increasing. A growing percentage of school leaders are within three to seven years of a standard retirement age. There is agreement that few Christian school leaders and governing boards proactively plan for succession.

For schools to be prepared, school leaders must work with their boards to assemble succession plans for temporary and emergency situations and for permanent leadership changes. Creating a good plan will require honest and thoughtful reflection, excellent and ongoing communication, and respect for both biblical and business models of leadership cultivation.

### **Temporary Succession Positioning**

Succession positioning is different from succession planning. Every school leader should prepare for contingencies, including illnesses or emergencies that cause the leader to be absent for a time or for an unexpected departure or even for a death of the leader. The reality is that no one is immune from these unforeseen circumstances. Even when school leaders accept new positions, the governing board will need sufficient time to seek a permanent replacement.

Temporary succession positioning enables the work of God's kingdom in the local Christian school to continue in the event that the leader is temporarily out of commission or called to a different place or position.

Just as every school should have a crisis response plan, so every school should have a temporary succession plan. On a basic level, every school leader should identify, equip, and train an individual on the staff who has leadership gifts.

The trained individual should be prepared to step into leadership roles when emergencies or events call for temporary leadership.

The governing board should be aware and supportive of the temporary succession positioning plan. In the event of an emergency or crisis, proactive positioning will best insure smooth operation and clear communication during the emergency or crisis and until restoration. The worst time to be without a plan, or to create a plan, is in the middle of a crisis.

The effective and successful school leader, with the support of the board chair, will insure that temporary succession positioning is a part of the school's crisis plan. The leader will insure the temporary leader is identified, that the governing board and staff are aware of the plan, and that the individual is equipped and prepared to do what is required of the temporary leader.

## Succession Introspection

There are healthy and positive reasons that the topic of succession is sometimes avoided. There are also legitimate concerns about vulnerability that may cause leaders to avoid the topic. There are a number of possible reasons that both are the case. The individual school leader may find his or her own story as he or she takes an introspective look at succession planning.

For some, succession planning may seem an affront to faithfulness. Christian school leaders are called by God to serve. Trust is a sign of faithfulness to the call. There is a strong belief that God will provide the right leader and at the time of his choosing. There may be a sense that planning for succession could be perceived as a lack of faith or trust that God is in control.

For others, thinking about succession is easily overlooked. It slips between the cracks as the diligent leader attends to daily demands. Leadership is challenging, and succession planning can quickly become a back-burner item that can be gotten to later. Postponement replaces planning.

Some Christian school leaders and governing boards seem reluctant to proactively plan for succession. Perhaps this could be due to denial that a time of transition is coming. Perhaps it is due to feelings of vulnerability. For a school leader to raise the topic of succession with his or her board has the potential to open the door to becoming less valued and/or the door to lame-duck status. If the school leader begins to talk about succession planning, the governing board may begin to think beyond their leader to new possibilities.

For the governing board chair to raise the topic has the potential to change the dynamics of the board/school leader relationship. The leader could feel threatened or vulnerable, thinking that he or she is being forced out.

Many school leaders have built their careers on their own leadership characteristics and unique style. That often includes confidence in their personal and professional skills for leadership. Where weaknesses are identified, the leader has created accommodations and instituted unique systems that work for him or her.

Successful leaders may believe that “No one can do the job like I can do the job.” To begin to consider a succession plan will open the door to the reality that someone else might be able to do the leader’s job and might do it differently. That could be a harsh reality for a long-standing, successful leader.

Effective school leadership requires a significant professional commitment. There is sacrifice in leadership. Over time, the school leader may find his or her identity closely connected to the role. If school leadership was just a job, it would be less so. But consideration of succession related to the calling creates a sense of vulnerability in the individual.

Future planning is a significant part of the role of the leader. Leadership succession should be part of both the leader’s plan and the school’s strategic plan. Denial is the first introspective hurdle, and it may require multiple conversations with trusted colleagues, mentors, or advisors to cross the first hurdle. After the emotional hurdle is crossed, school leaders must focus on their calling to raise-up new leaders; training the next generation to serve and lead for the sake of the kingdom.

Overcoming the sense of vulnerability and threat are the second and third hurdles. The hurdles will not be as high if the school leader has a transparent and open relationship with his or her board chair. Conversing about and planning for succession will be less difficult if that relationship is positive. Regardless of the relationship, counsel from trusted friends, colleagues, mentors, and advisors will help in overcoming the sense of threat. For some, professional counseling guidance may be helpful.

### **Succession Planning**

Effective leaders anticipate, prepare, and plan, and that includes planning for a time when they will no longer be on staff. A school leader within three to five years of retirement should begin to prepare a plan, and a school leader who is within two to three years of retirement should have a succession plan in place.

The range is suggested because schools have different timetables. Some timetables are chosen and some are simply a result of the natural rhythm of the board calendar. The typical strategic plan is a five-year plan cycle. School improvement plans (accreditation) are usually five-year plans as well.

The terms of board member service vary, as do their rotations. Of specific importance is the term of service for the board chair. Ideally, the school head plans his or her departure so that the board chair is in place for at least a year before and after the departure of the school leader.

Successful school leaders are mindful of effective planning timelines. While the situation may vary slightly for different school leaders and boards, succession plans have been derailed by incoming board chairs who bring along a different view or approach. Synchronism between the head of school and the board chair are crucial for both succession planning and implementation.

The head of school should be involved in the planning phase, and the board would be well-served in utilizing the head of school in an advisory capacity through the transition. But the head of school should avoid serving on the search and interview team, because it could bring a bias and a personal agenda to the process.

### **Biblical Model of Succession**

Jesus chose to walk this earth for three years as a rabbi. The rabbinic model was not new to Jesus or to the first century. The biblical story and Jewish practices both trace the origin of the model to Moses. Moses trained Joshua, an apprentice who would replace him. Elijah prepared Elisha. It is the model of rabbi/talmid.

The rabbi was the leader. The rabbi was more like an educator than a pastor. At the Tabernacle, what we might call church leadership was assigned to Aaron and the tribe of Levi. Daily sacrifices and prayers were offered and led by Levites. When the Temple was constructed, the priests, from the line of Levi, led and carried out the Temple sacrifice system. They presided over the God-ordained holiday feasts. While sacrifices were offered daily at the appointed hours of 9 a.m. and 3 p.m., the Temple system is the closest parallel that we have to our Sunday and midweek worship times in our churches.

Rabbis were teachers. By Jesus' time, the region of Galilee was the rabbinic center. The best of the rabbis were teaching within the religious triangle towns from Capernaum, to Bethsaida, to Chorazin on the northwest region of the lake.

There were common rabbis in 1<sup>st</sup> century Galilee. The gospels refer to them as Torah teachers or teachers of the law (Torah). They were only permitted to teach what the religious communities had agreed were accepted Torah teachings and interpretations. They were forbidden from adding or modifying any teachings.

There was another category of rabbi called rabbis with *shmikah*. These rabbis were the best of the best. *Shmikah* means authority. It was accepted that rabbis with *shmikah* could go beyond common understandings and interpretations and add new teachings and interpretations.

Rabbis with *Shmikah* had a select inner circle of talmidim. *Talmid* (singular) and *talmidim* (plural) were disciples. Female disciples were called *talmidot*. Our western view of discipleship is based on learning about the teacher: what the teacher knows, believes, and teaches. The eastern view of discipleship includes, but goes far beyond, knowledge. Talmidim and talmidot longed to become just like their rabbi: to be what their rabbi is.

By the time of the first century, rabbis with *shmikah* didn't just claim it. *Shmikah* was bestowed. The tradition and requirement was that it had to be given by two rabbis who had it.

My Jewish friends have said, "You Christians do not understand. In Jesus, you have the only rabbi in Jewish rabbinic history to receive *shmikah* directly from the Father." Mark tells the story; Jesus stepped into the Jordan to be baptized by John ("Behold, the lamb of God"), and the heavens opened and the Father's voice thundered, "This is my Son; listen to him!"

John the Baptist was the second to bestow authority to Jesus. In Matthew 21:25 the authority of Jesus was questioned by the Temple leaders. Jesus replied to their accusation with a question: "From where did John get his authority?" The question infers that John had authority. The Temple leaders huddled. They concluded that they would respond with, "We don't know." The inference in the response is that they acknowledged John's authority, but were unclear about the source of it. The conversation stopped.

Jesus received legitimate authority from the Father and from John.

Matthew 5-7 is filled with statements that could only be made if the rabbi had *shmikah*: "You heard it said, but I say." "You heard it said" acknowledges the accepted understandings and interpretations made by Torah teachers. "But I say" is something only a rabbi with *shmikah* could teach without facing stoning for blasphemy. Matthew 7 concludes with: "He taught as one with authority and not as a teacher of the law." That is *shmikah*.

Jesus' final words to his disciples before the ascension are recorded in Matthew 28, "All authority (ALL *shmikah*) has been given to me! Go and make disciples!"

Jesus gave authority to his disciples. To prepare them, Jesus spent three years with them. Their desire was not to know what he knew; their passion was to become what he was. Jesus was on earth to fulfill the kingdom mission of his Father. His mission led to the cross for our salvation. He arose and conquered death, and his kingdom advances. He gave authority to leaders who would follow, entrusting the advancement of his kingdom to their care.

## **Application of the Biblical Model for Christian School Succession Planning**

The application of the model for Christian school leadership succession suggests that it is wise to discern the leadership skills of the next generation of leaders in our Christian schools. It would be better for the current leader to mentor the next leader in preparation for the calling, just as Moses mentored Joshua and as Jesus prepared his disciples for the calling to leadership.

It would also be better for the next leader to be given time to grow into a more complete understanding of the role, the responsibilities, and the culture of community in order to take on the role and perform successfully. Joshua was mentored by Moses for several years. The disciples of Jesus were prepared by him for the majority of his three-year ministry on earth.

Is it better to mentor the next leader from within? The biblical model suggests that the answer is yes. For Christian schools, “within” could mean from within the local school or school community. It could also mean from among the community of schools that share a common understanding, biblical worldview, and mission for Christian education.

Research reported in August 2009 Littleford and Associates newsletter confirms that, on a practical level, it is also a better path for the school: “In the independent schools world, we hire externally 90 percent of the time and ‘fire’ about 80 percent of those heads within the first five years. On the other hand, when we hire internally and develop an internal succession plan, the internal candidate is fired in the first five years only 10 percent of the time.” The Littleford and Associates research indicates that hiring from outside of the organization is effective beyond five years in only 20 percent of the cases.

While it is not a factor in the research, it seems logical that the probability of success in hiring the next Christian school leader from outside of the school increases if the new leader is coming to the school from within the community or from a similar Christian school community.

### **Conclusion**

Jesus stood up one day in the Temple and declared, “Let anyone who is thirsty come to me and drink” (John 7:37). Jesus didn’t conclude John 7 at verse 37. He went on: “Whoever believes in me, as Scripture has said, rivers of living water will flow from within them” (verse 38).

That describes the advancement of the kingdom of God! When leaders and teachers are the *talmidim* and *talmidot* of Jesus, not only are those who experience living water led to Jesus, but they are led to see that disciples of Jesus are like him, too.

School leaders have been called to lead and to serve for a time. The length is not important, but faithfulness is. Leaders are called to be faithful in the time of service and as you prepare for the next generation to be led to know God and his story.

An ancient rabbi said, “No one should live without a rabbi. No one should die without disciples.” Do not fear succession positioning or planning. God has called you. God is in control. Lead for him today; plan for tomorrow. And in all things, to God be the glory!

## **Resources**

We recognize that succession positioning and planning cannot be followed like a step-by-step recipe. Almost every situation and circumstance will be unique to the specific Christian school and community. We encourage school leaders to seek advice from trusted colleagues, personal mentors, or pastors.

We also encourage school leaders and board chairs to consider seeking advice from your Christian school membership association. Each association has staff members who have experienced succession and advised others. Each association also has partnerships that may be of value to you.

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