SOS PRACTICAL SCHOOL LEADERSHIP SERIES

Day One Head of School Toolkit

48 Editable Leadership Tools for the First 100 Days and Beyond

Edward J. Lindekugel, Ed.D., M.B.A.

SOS School Leadership Press

Companion to Day One as Head of School

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The tools are original to the SOS Day-One Leadership Framework. Where the companion book discusses concepts associated with Patrick Lencioni, Simon Sinek, or other authors, consult the original works for their proprietary models, diagrams, assessments, and full methodologies.

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Quick Start

Do not try to complete all 48 tools. Use the toolkit selectively. The tools are organized around the five phases of the SOS Day-One Leadership Framework: UNDERSTAND, LISTEN, DIAGNOSE, ALIGN, and EXECUTE. A new Head should normally begin with the Pre-Start tools, then add later tools only as the transition creates a need.

> **Three operating rules**
>
> 1) Use evidence before anecdote. 2) Name the owner of important work. 3) Record what you decide, not merely what you discuss.

BEFORE DAY ONE — UNDERSTAND

1. Pre-Start Document Request List
2. Board Chair–Head Expectations Worksheet
3. Board Chair–Head Compact
4. First-100-Days Calendar
5. Transition Journal
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DAY 100+ — EXECUTE

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TOOL 1

Pre-Start Document Request List

Use when

Immediately after accepting the position; use it to build the due-diligence file before Day One.

How to use: Complete the tool with the people closest to the work. Record evidence and decisions; avoid turning the form into a substitute for judgment.

Category	Documents / Information Requested	Received	Reviewed	Follow-Up
Governance	Bylaws; Board roster; committee structure; policies; recent minutes; Board calendar; Head evaluation materials			
Strategy & Accreditation	Current/previous strategic plans; implementation reports; accreditation report; outstanding recommendations			
Finance	Budget; 3 years actuals; audit; management letter; cash-flow projection; debt schedule; capital obligations			
Enrollment	5 years enrollment; inquiries; applications; acceptances; yield; retention; attrition; aid data			
Advancement	Annual giving; participation; major-gift pipeline; campaign status; donor restrictions; pledges			
Personnel	Org chart; roster; job descriptions; handbook; evaluation process; turnover; vacancies; searches			
Academic	Curriculum overview; course catalog; master schedule; assessment data; major initiatives			
Students & Culture	Attendance; discipline; retention; counseling/support structures; student survey data			
Parents & Communication	Parent handbook; surveys; complaint process; crisis			

	communication; parent organization			
Facilities / Safety / Tech	Campus plan; deferred maintenance; emergency plans; cybersecurity; vendor contracts			
Legal / Compliance / Risk	Pending claims; compliance deadlines; accreditation concerns; significant contracts			
Commitments	Capital projects; donor restrictions; announced hires/programs; compensation commitments; partnerships			

TOOL 2

Board Chair–Head Expectations Worksheet

Use when

Before Day One and again whenever the Board Chair changes.

How to use: Complete the tool with the people closest to the work. Record evidence and decisions; avoid turning the form into a substitute for judgment.

What does the Board believe I was hired to accomplish?

_____

_____

What does the Chair most need from the Head?

_____

_____

What does the Head most need from the Chair?

_____

_____

Topic	Working Agreement
Meeting cadence	
Urgent contact method	
No-surprises issues	
Board agenda development	
Board access to employees	
Head communication with trustees	
Evaluation process	
Handling disagreement	
Confidentiality expectations	

TOOL 3

Board Chair–Head Compact

> **Use when**
>
> After the expectations conversation; use as a one-page operating agreement.

How to use: Complete the tool with the people closest to the work. Record evidence and decisions; avoid turning the form into a substitute for judgment.

Compact Element	Agreement
Recurring meeting	
Routine communication	
Urgent communication	
No-surprises categories	
Board packet / agenda timing	
Head goals finalized by	
Head evaluation process	
Committee participation	
Trustee requests to staff	
Disagreement protocol	
Six-month relationship review date	

Chair signature / acknowledgment:

_____

Head signature / acknowledgment:

_____

TOOL 4

First-100-Days Calendar

Use when

Before the start date; map transition work by week so listening and due diligence do not disappear under daily operations.

How to use: Complete the tool with the people closest to the work. Record evidence and decisions; avoid turning the form into a substitute for judgment.

Week	Primary Objective	Key Meetings	Deliverable / Decision	Notes
Week 1				
Week 2				
Week 3				
Week 4				
Week 5				
Week 6				
Week 7				
Week 8				
Week 9				
Week 10				
Week 11				
Week 12				
Week 13				
Week 14				

TOOL 5

Transition Journal

Use when

Beginning the day you accept the position and throughout the first 100 days.

How to use: Complete the tool with the people closest to the work. Record evidence and decisions; avoid turning the form into a substitute for judgment.

Date	Type	Observation / Question / Commitment / Person / Pattern	Evidence / Source	Follow-Up

Suggested tags: OBSERVATION • QUESTION • COMMITMENT • PEOPLE • PATTERN

TOOL 6

Institutional Reading File

Use when

During due diligence and the first month; create a structured reading file instead of accumulating disconnected documents.

How to use: Complete the tool with the people closest to the work. Record evidence and decisions; avoid turning the form into a substitute for judgment.

Folder / Domain	What Appears Strong	Questions	Risks	Potential Action
Mission & Identity				
Governance				
Finance & Operations				
Enrollment & Advancement				
Academic Program				
People & Culture				
Risk & Commitments				

TOOL 7

Stakeholder Map

Use when

Before and during the listening tour; use to distinguish formal authority from informal influence.

How to use: Complete the tool with the people closest to the work. Record evidence and decisions; avoid turning the form into a substitute for judgment.

Stakeholder / Group	Formal Role	Influence (L/M/H)	Primary Interests	Relationship Needed	Risk / Misunderstanding

TOOL 8

SOS Transition Listening Protocol

Use when

During listening meetings with trustees, faculty, parents, students, alumni, donors, and staff.

How to use: Complete the tool with the people closest to the work. Record evidence and decisions; avoid turning the form into a substitute for judgment.

What does this school do exceptionally well?

_____

_____

What is distinctive about it?

_____

_____

What should a new Head be careful not to lose?

_____

_____

What is the most important challenge facing the school?

_____

_____

What problem has been discussed repeatedly without being solved?

_____

_____

What makes it harder than necessary for people to do excellent work?

_____

_____

Why do families choose the school?

_____

_____

Why do families leave?

_____

_____

What might a new Head misunderstand about this place?

_____

_____

If you were in my position, what question would you investigate first?

_____

_____

What should I have asked but did not?

_____

_____

Who else should I make sure I speak with?

_____

_____

TOOL 9

Listening Theme Matrix

Use when

After multiple listening conversations; use it to detect convergence, divergence, and claims requiring verification.

How to use: Complete the tool with the people closest to the work. Record evidence and decisions; avoid turning the form into a substitute for judgment.

Theme	Who Raised It	Stakeholder Group	Frequency	Evidence Offered	Additional Evidence Needed	Importance	Possible Response

TOOL 10

Pre-Start Brief

> **Use when**
>
> Immediately before Day One; compress pre-start learning into one page.

How to use: Complete the tool with the people closest to the work. Record evidence and decisions; avoid turning the form into a substitute for judgment.

Strongest assets:

_____

_____

_____

_____

Most important unanswered questions:

_____

_____

_____

_____

Potential risks:

_____

_____

_____

_____

Immediate priorities:

_____

_____

_____

Matters I will deliberately not change yet:

_____

_____

_____

Ten people I most need to understand:

_____

_____

_____

_____

_____

Five questions I must answer during Month One:

_____

_____

TOOL 11

Head's Financial Readiness Dashboard

Use when

During Month One and monthly thereafter; gives the Head a concise financial readiness view.

How to use: Complete the tool with the people closest to the work. Record evidence and decisions; avoid turning the form into a substitute for judgment.

Indicator	Current	Budget / Target	Prior Period	Trend	Status G/Y/R	Owner / Follow-Up
Actual enrollment						
Budgeted enrollment						
Net tuition revenue						
Financial aid / remission						
Operating revenue						
Operating expense						
Unrestricted cash						
Accounts receivable						
Annual giving						
Capital spending						
Debt service / obligations						
Projected year-end result						

What changed?

_____

_____

Why?

_____

_____

Does it matter?

_____

_____

What action is required?

_____

TOOL 12

Enrollment Health Dashboard

Use when

During Month One and throughout admissions/reenrollment season.

How to use: Complete the tool with the people closest to the work. Record evidence and decisions; avoid turning the form into a substitute for judgment.

Metric	Current Year	Prior Year	Target	Conversion / Rate	Trend	Action Needed
Total enrollment						
Budgeted enrollment						
Inquiries						
Visits / engagements						
Applications						
Acceptances						
Deposits / enrolled						
Yield						
Returning contracts						
Retention						
Withdrawals						
Aid requests						
Aid awards						
Net tuition revenue						

TOOL 13

Leadership Team Assessment

Use when

During the first 30–60 days; assess role clarity and leadership performance without relying on reputation.

How to use: Complete the tool with the people closest to the work. Record evidence and decisions; avoid turning the form into a substitute for judgment.

Leader / Role	Results (1–5)	Leadership (1–5)	Judgment (1–5)	Trust (1–5)	Institutional Contribution (1–5)	Evidence Needed	Would I Hire Today?

Team strengths:

_____

_____

_____

Team risks / gaps:

_____

_____

_____

Role-design questions:

_____

_____

_____

TOOL 14

Faculty Culture Map

Use when

During Month One; rate your confidence in the diagnosis, not the faculty themselves.

How to use: Complete the tool with the people closest to the work. Record evidence and decisions; avoid turning the form into a substitute for judgment.

Dimension	Confidence 1–5	Evidence Supporting	Evidence Missing	Follow-Up
Mission alignment				
Collegial trust				
Leadership trust				
Professional accountability				
Instructional quality				
Workload sustainability				
Communication				
Professional growth				
Recognition				
Compensation competitiveness				
Change readiness				
Retention risk				

Parent Community Map

Use when

During Month One; map the parent community as a system, not as a collection of complaints.

How to use: Complete the tool with the people closest to the work. Record evidence and decisions; avoid turning the form into a substitute for judgment.

Dimension	What We Know	Evidence / Source	Risk or Opportunity	Next Step
What parents value most				
What parents worry about most				
Expectation gaps				
Recurring complaints				
Primary communication channels				
Influential parent networks				
Where trust is strong				
Where trust is fragile				
Retention implications				

TOOL 16

Parent Concern Framework

> **Use when**
>
> When a significant parent concern escalates beyond routine resolution.

How to use: Complete the tool with the people closest to the work. Record evidence and decisions; avoid turning the form into a substitute for judgment.

What happened?

_____

_____

What does the parent believe happened?

_____

_____

What does the employee believe happened?

_____

_____

What policy or expectation applies?

_____

_____

Has the appropriate process been followed?

_____

_____

Is there a student need beneath the stated complaint?

_____

_____

What outcome is the parent requesting?

_____

_____

What can the school reasonably do?

_____

_____

What should the school not do?

_____

_____

How should the decision be communicated?

_____

_____

TOOL 17

Thirty-Day Institutional Read

Use when

At approximately Day 30; summarize learning before converting observations into initiatives.

How to use: Complete the tool with the people closest to the work. Record evidence and decisions; avoid turning the form into a substitute for judgment.

Domain	What Appears Strong	What Concerns Me	What I Still Need to Understand	What May Require Action
Governance				
Finance				
Enrollment				
Leadership Team				
Faculty Culture				
Parent Community				
Academic Program				
Operations / Risk				

TOOL 18

SOS School Health Dashboard

Use when

At Days 31–60 and monthly/quarterly thereafter; create an early-warning system for institutional health.

How to use: Complete the tool with the people closest to the work. Record evidence and decisions; avoid turning the form into a substitute for judgment.

Domain / Indicator	Current	Prior	Target	Trend	Status G/Y/R	Owner
Student retention						
Academic outcomes						
Attendance						
Discipline patterns						
Total enrollment						
Inquiry volume						
Yield						
Returning-family retention						
Net tuition revenue						
Operating result						
Unrestricted cash						
Annual giving						
Personnel cost						
Deferred maintenance						
Faculty turnover						
Vacancies						
Leadership-team stability						
Parent satisfaction						
Recurring complaints						
Student withdrawals tied to experience						

TOOL 19

Executive Leadership Triage Sheet

Use when

When an issue is presented as urgent; use to separate emotional intensity from institutional consequence.

How to use: Complete the tool with the people closest to the work. Record evidence and decisions; avoid turning the form into a substitute for judgment.

Field	Assessment
Issue	
Risk Level (1–4)	
Known Facts	
Unknowns	
Consequence of Delay	
Reversibility	
Precedent Implications	
Owner	
Decision Deadline	
Next Action	

TOOL 20

Quick-Win Test

> **Use when**
>
> Before launching an early “quick win.”

How to use: Complete the tool with the people closest to the work. Record evidence and decisions; avoid turning the form into a substitute for judgment.

Test	Yes / No / Unsure	Evidence / Notes
Is the problem real?		
Do we understand it?		
Can we solve it without creating a larger problem?		
Is the solution consistent with mission and strategy?		
Can we explain why we are doing it?		
Will we know whether it worked?		

Decision: Proceed / Revise / Wait

_____

_____

How success will be measured:

_____

_____

TOOL 21

Decision Rights Matrix

Use when

When recurring decisions create role confusion or unnecessary upward delegation.

How to use: Complete the tool with the people closest to the work. Record evidence and decisions; avoid turning the form into a substitute for judgment.

Decision	Recommend	Decide	Consult	Inform	Notes
Strategic plan					
Annual budget					
Tuition recommendation					
Debt / major capital					
Senior hiring / termination					
Teacher hiring					
Compensation within budget					
Curriculum changes					
Student discipline					
Facilities / purchasing					
Admissions policy					
Financial aid parameters					
Donor restrictions					

TOOL 22

Delegation Brief

> **Use when**
>
> Whenever delegating a significant decision or project.

How to use: Complete the tool with the people closest to the work. Record evidence and decisions; avoid turning the form into a substitute for judgment.

Delegation Element	Definition
Desired outcome	
Authority granted	
Constraints / policy boundaries	
Budget / resources	
Deadline	
Escalation triggers	
Reporting expectation	
Final owner	

TOOL 23

Weekly Leadership Meeting Agenda

Use when

Use every week with the senior leadership team; keep routine information out unless it requires discussion.

How to use: Complete the tool with the people closest to the work. Record evidence and decisions; avoid turning the form into a substitute for judgment.

Agenda Item	Time	Key Question / Output
Critical developments	10 min	What materially changed?
Dashboard exceptions	10 min	What requires attention?
Decisions required	20 min	What must be decided today?
Priority progress	20 min	What moved / stalled?
Cross-functional issues	15 min	Where must teams coordinate?
Upcoming risks	10 min	What is approaching?
Commitments	5 min	Who will do what by when?

Decisions made:

_____

_____

_____

_____

Commitments / owners / deadlines:

_____

_____

_____

_____

TOOL 24

Leadership Decision Log

Use when

After every leadership or Board meeting in which a consequential decision is made.

How to use: Complete the tool with the people closest to the work. Record evidence and decisions; avoid turning the form into a substitute for judgment.

Date	Decision	Owner	Deadline	Who Must Be Informed	Status / Follow-Up

TOOL 25

Head–Direct Report One-on-One Template

> **Use when**
>
> Weekly or biweekly with each direct report.

How to use: Complete the tool with the people closest to the work. Record evidence and decisions; avoid turning the form into a substitute for judgment.

Top priorities since last meeting

_____

_____

_____

Obstacles / risks

_____

_____

_____

Decisions needed from Head

_____

_____

_____

People / personnel issues

_____

_____

_____

Development / coaching

_____

_____

_____

Forward look: what is coming?

_____

_____

_____

Commitments before next meeting

_____

_____

_____

TOOL 26

Monthly Operating Review

Use when

Monthly with senior leadership; step above weekly operations and review the whole institution.

How to use: Complete the tool with the people closest to the work. Record evidence and decisions; avoid turning the form into a substitute for judgment.

Domain	Current Status	What Changed?	Primary Risk	Decision / Action	Owner
School Health Dashboard					
Finance					
Enrollment					
Advancement					
Personnel / Culture					
Strategic Priorities					
Operations / Facilities					
Risk / Compliance					
Upcoming Board Decisions					

TOOL 27

Sixty-Day School Health Assessment

Use when

At approximately Day 60; convert learning into an evidence-based health assessment.

How to use: Complete the tool with the people closest to the work. Record evidence and decisions; avoid turning the form into a substitute for judgment.

Domain	G/Y/R	Evidence	Questions	Potential Action
Mission				
Governance				
Finance				
Enrollment				
Advancement				
Academic Program				
People & Culture				
Operations & Risk				
Leadership Capacity				

Five strongest institutional assets:

_____

_____

_____

_____

_____

Five greatest vulnerabilities:

_____

_____

_____

_____

_____

Three issues requiring earliest attention:

_____

_____

_____

Three issues that should deliberately wait:

_____

_____

TOOL 28

Five-Test Priority Framework

Use when

When selecting first-year priorities; prevents worthy ideas from becoming an unmanageable agenda.

How to use: Complete the tool with the people closest to the work. Record evidence and decisions; avoid turning the form into a substitute for judgment.

Test	Assessment	Evidence
Mission — Does this matter to the school's fundamental purpose?		
Consequence — What happens if we do not address it?		
Evidence — What tells us the issue is real?		
Leverage — Will progress improve multiple parts of the institution?		
Capacity — Can we make meaningful progress this year?		

Classification: Stabilization / Improvement / Opportunity

_____

_____

Priority decision:

_____

_____

TOOL 29

Year-One Priority Charter

> **Use when**
>
> For every major first-year priority; converts aspiration into accountable work.

How to use: Complete the tool with the people closest to the work. Record evidence and decisions; avoid turning the form into a substitute for judgment.

Charter Element	Response
Priority	
Why it matters now	
Evidence	
Desired year-end outcome	
Owner	
Contributing team	
Milestones	
Measures	
Resources	
Dependencies	
Risks	
Communication plan	

TOOL 30

Year-One Leadership Scorecard

Use when

Review monthly; keeps three to five institutional priorities visible and honest.

How to use: Complete the tool with the people closest to the work. Record evidence and decisions; avoid turning the form into a substitute for judgment.

Priority	Owner	Status G/Y/R	Next Milestone	Deadline	Barrier	Next Leadership Action

TOOL 31

Strategic Communication Planner

Use when

Before communicating a significant initiative, difficult decision, or change.

How to use: Complete the tool with the people closest to the work. Record evidence and decisions; avoid turning the form into a substitute for judgment.

Audience	What They Need to Understand	Messenger	Medium	Timing	Feedback Method	Follow-Up

TOOL 32

Faculty Accountability Framework

Use when

For coaching, evaluation, or performance intervention; connect standards, evidence, support, and follow-through.

How to use: Complete the tool with the people closest to the work. Record evidence and decisions; avoid turning the form into a substitute for judgment.

Field	Notes
Employee / Role	
Performance standard	
Evidence	
Strengths	
Growth need / concern	
Support required	
Required expectation	
Timeline	
Review dates	
Outcome / next step	

TOOL 33

Enrollment Leadership Review

Use when

During critical admissions and reenrollment seasons; use as the Head's executive enrollment review.

How to use: Complete the tool with the people closest to the work. Record evidence and decisions; avoid turning the form into a substitute for judgment.

Metric	Current	Prior / Benchmark	Target	Trend	Risk / Explanation	Leadership Action
Enrollment						
Inquiries						
Visits						
Applications						
Yield						
Retention						
Attrition						
Financial aid						
Net tuition						

Primary enrollment risk:

_____

_____

Head involvement required:

_____

_____

Decision before next review:

_____

_____

TOOL 34

Advancement Leadership Review

Use when

Monthly or quarterly with advancement leadership; keep philanthropy connected to mission, stewardship, and executive relationships.

How to use: Complete the tool with the people closest to the work. Record evidence and decisions; avoid turning the form into a substitute for judgment.

Metric / Area	Current	Goal	Trend	Risk / Opportunity	Head Involvement	Next Action
Annual giving						
Participation						
Major gifts						
Pipeline						
Stewardship						
Board giving						
Campaigns						
Alumni engagement						
Donor risks						

TOOL 35

Change Readiness Test

Use when

Before a significant structural, policy, program, or cultural change.

How to use: Complete the tool with the people closest to the work. Record evidence and decisions; avoid turning the form into a substitute for judgment.

Test	Assessment	Evidence / Notes
Is the problem sufficiently important?		
Do we understand the cause?		
Is the proposed solution materially better?		
Does the organization have capacity?		
Are the right people prepared?		
What will this disrupt?		
Can we explain why now?		

Classification: Change Now / Prepare to Change / Preserve for Now

_____

_____

Decision / next review date:

_____

_____

TOOL 36

Not-Yet List

Use when

Whenever an important issue is consciously deferred; keeps “not now” from becoming “forgotten.”

How to use: Complete the tool with the people closest to the work. Record evidence and decisions; avoid turning the form into a substitute for judgment.

Issue	Why It Matters	Why Not Now	Trigger for Reconsideration	Review Date	Owner

TOOL 37

Day-100 Leadership Agenda

> **Use when**
>
> At approximately Day 100; use as the organizing structure for the Head's transition report.

How to use: Complete the tool with the people closest to the work. Record evidence and decisions; avoid turning the form into a substitute for judgment.

What I Have Learned

_____

_____

_____

_____

Strengths We Must Protect

_____

_____

_____

_____

Vulnerabilities We Must Address

_____

_____

_____

_____

First-Year Institutional Priorities

_____

_____

_____

_____

Measures of Progress

_____

_____

_____

Leadership Ownership

What We Are Deliberately Not Doing Yet

TOOL 38

High-Stakes Decision Worksheet

Use when

For high-stakes decisions involving safety, people, governance, money, reputation, or material precedent.

How to use: Complete the tool with the people closest to the work. Record evidence and decisions; avoid turning the form into a substitute for judgment.

Field	Working Notes
Situation	
Immediate risk	
Known facts	
Unknown facts	
Decision authority	
Stakeholders	
Mission / policy considerations	
Legal / professional advice needed	
Options	
Consequences	
Decision	
Communication plan	
Follow-up	
Institutional learning	

TOOL 39

Parent Conflict Case Review

Use when

After a significant parent conflict; supports consistent, documented resolution.

How to use: Complete the tool with the people closest to the work. Record evidence and decisions; avoid turning the form into a substitute for judgment.

Field	Assessment
Complaint / concern	
Underlying concern	
Evidence	
Employee perspective	
Policy / expectation	
Process followed	
Requested outcome	
Reasonable outcome	
Boundary	
Communication	
Follow-up	

TOOL 40

Trustee Boundary Diagnostic

Use when

When a trustee may be crossing from governance into management.

How to use: Complete the tool with the people closest to the work. Record evidence and decisions; avoid turning the form into a substitute for judgment.

Field	Assessment
Trustee action	
Specific behavior—not motive	
Governance issue	
Operational impact	
Prior practice / ambiguity	
Board Chair involvement	
Clarification required	
Follow-up	
Board-level action if pattern continues	

TOOL 41

Faculty Performance Intervention Plan

Use when

When a teacher or staff member requires a formal, documented improvement process. Coordinate with policy and qualified counsel as appropriate.

How to use: Complete the tool with the people closest to the work. Record evidence and decisions; avoid turning the form into a substitute for judgment.

Field	Plan
Employee / Role	
Performance standard	
Evidence	
Previous feedback	
Required improvement	
Support / resources	
Measures of improvement	
Timeline	
Review dates	
Consequences if not improved	
Final outcome	

TOOL 42

Senior Leader Performance Diagnostic

Use when

When a senior administrator appears not to be working out; diagnose before deciding.

How to use: Complete the tool with the people closest to the work. Record evidence and decisions; avoid turning the form into a substitute for judgment.

Dimension	What Is Happening?	Evidence	Can It Be Corrected?	Action
Capability				
Capacity				
Role design				
Clarity of expectations				
Support / authority				
Leadership behavior				
Institutional fit				
Cost of delay				

Improvement period / decision date:

_____

_____

Final judgment:

_____

_____

TOOL 43

Donor Request Independence Test

Use when

When a donor requests a decision, exception, or influence connected—explicitly or implicitly—to philanthropy.

How to use: Complete the tool with the people closest to the work. Record evidence and decisions; avoid turning the form into a substitute for judgment.

What exactly is being requested?

_____

_____

Does the request align with mission and strategy?

_____

_____

Would we make this decision if the donor had given nothing?

_____

_____

Would we be comfortable explaining the rationale to another family or donor?

_____

_____

What precedent would this create?

_____

_____

Does the request imply operational control?

_____

_____

What long-term costs or obligations could result?

_____

_____

Does the Board need to be informed?

_____

_____

What is the respectful response?

_____

_____

TOOL 44

Budget Surprise Response Sheet

Use when

When an unexpected financial variance or cash problem emerges.

How to use: Complete the tool with the people closest to the work. Record evidence and decisions; avoid turning the form into a substitute for judgment.

Field	Assessment
Variance / problem	
Size	
Timing	
Cause	
One-time or structural?	
Cash impact	
Best case	
Most likely case	
Worst case	
Option A	
Option B	
Option C	
Mission impact	
Recommended response	
Structural fix after stabilization	

TOOL 45

Enrollment Variance Diagnostic

Use when

When enrollment is materially below forecast or reenrollment/yield deteriorates unexpectedly.

How to use: Complete the tool with the people closest to the work. Record evidence and decisions; avoid turning the form into a substitute for judgment.

Field	Assessment
Budgeted enrollment	
Current forecast	
Variance	
Funnel stage where problem appears	
Grade / program concentration	
Retention issues	
Financial-aid impact	
Competitor / market factors	
Immediate actions	
Structural actions	
Owner	
Review date	

TOOL 46

Crisis Leadership Checklist

> **Use when**
>
> Use before and during a public, safety, legal, reputational, or operational crisis.

How to use: Complete the tool with the people closest to the work. Record evidence and decisions; avoid turning the form into a substitute for judgment.

- ☐ **1.** Immediate safety action identified
- ☐ **2.** Crisis team activated
- ☐ **3.** Known facts documented
- ☐ **4.** Unknowns documented
- ☐ **5.** Board Chair informed when appropriate
- ☐ **6.** Legal / professional counsel engaged when needed
- ☐ **7.** Spokesperson designated
- ☐ **8.** Internal communication prepared
- ☐ **9.** External communication prepared
- ☐ **10.** Media routing instructions issued
- ☐ **11.** Student / employee privacy protected
- ☐ **12.** Next-phase risks identified
- ☐ **13.** Next update time established
- ☐ **14.** After-action review scheduled

Current verified facts:

_____

_____

_____

_____

What we do not yet know:

_____

_____

_____

Next communication:

_____

_____

TOOL 47

Twelve-Month Execution Calendar

Use when

After Day 100; place major milestones on one annual calendar and identify overload before it happens.

How to use: Complete the tool with the people closest to the work. Record evidence and decisions; avoid turning the form into a substitute for judgment.

Month	Priority / Milestone	Owner	Dependencies	School Calendar Conflicts	Status
July					
August					
September					
October					
November					
December					
January					
February					
March					
April					
May					
June					

TOOL 48

Year-One Leadership Review

> **Use when**
>
> At the end of Year One; compare the Day-100 diagnosis with actual outcomes and prepare Year Two.

How to use: Complete the tool with the people closest to the work. Record evidence and decisions; avoid turning the form into a substitute for judgment.

Day-100 conclusions that proved correct

_____

_____

_____

Day-100 conclusions that proved wrong or incomplete

_____

_____

_____

Priority outcomes

_____

_____

_____

What stalled and why

_____

_____

_____

Leadership-team changes / growth

_____

_____

_____

Institutional strengths that increased

_____

_____

_____

Risks that increased

_____

_____

_____

Head self-assessment: greatest value added

_____

_____

_____

Head self-assessment: unnecessary friction created

What I avoided too long

What I moved too quickly on

What someone else should now own

What Year Two requires from my leadership

Year-Two priorities

Using the Toolkit With the Book

The toolkit is intentionally practical. The companion book provides the reasoning, cautions, examples, and judgment behind the forms. When a tool creates a difficult question, return to the corresponding chapter rather than forcing the form to produce an automatic answer.

Book Phase	Recommended Toolkit Tools
Before Day One	1–7, 10
Days 1–30	8–17
Days 31–60	18–27
Days 61–100	28–37
High-Stakes Decisions	38–46
Day 100 and Beyond	47–48

UNDERSTAND → LISTEN → DIAGNOSE → ALIGN → EXECUTE

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