A FREE SOS DAY-ONE LEADERSHIP RESOURCE

The New Head’s Day-One Checklist

37 Things to Obtain, Review, Clarify, or Schedule Before Your First Day

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Companion resource to Day One as Head of School

How to Use This Checklist

The first official day of headship is too late to begin learning what you have agreed to lead. Use this checklist between appointment and Day One to create enough institutional visibility to ask better questions, reduce avoidable surprises, and enter the school with disciplined curiosity rather than premature conclusions.

> **The principle**
>
> Move immediately on safety, legality, ethics, and material institutional risk. Move deliberately on almost everything else.

For each item, mark one of three statuses: Complete, Scheduled, or Needs Attention. The objective is not to finish every task before Day One; it is to make sure nothing consequential remains invisible by accident.

Governance & Board Relationship

☐ **1.** Obtain the bylaws, current governance policies, and any relevant sponsoring-body or ecclesial governance documents.

☐ **2.** Review the current Board roster, officers, committees, trustee terms, and annual Board calendar.

☐ **3.** Schedule a substantial expectations meeting with the Board Chair before Day One.

☐ **4.** Establish a recurring Head–Board Chair meeting cadence.

☐ **5.** Clarify the categories of information that should never surprise the Board Chair.

☐ **6.** Clarify Board/Head decision boundaries using concrete examples rather than general language.

☐ **7.** Review the process, criteria, timing, and participants for your evaluation as Head of School.

☐ **8.** Identify unresolved governance issues, Board dynamics, or historical role confusion that could affect the transition.

Mission, Strategy & Institutional Identity

☐ **1.** Review the mission, vision, values, graduate profile, philosophy of education, and faith/identity statements where applicable.

☐ **2.** Review the current strategic plan and determine what is complete, active, stalled, unfunded, or no longer relevant.

☐ **3.** Review the most recent accreditation report and unresolved recommendations or commitments.

☐ **4.** Create a basic institutional timeline showing major leadership transitions, enrollment changes, financial events, facilities projects, program launches, and significant controversies.

Finance & Sustainability

☐ **1.** Review the current operating budget and the enrollment assumptions on which it depends.

☐ **2.** Review at least three years of budget-to-actual financial results.

☐ **3.** Review the most recent audited financial statements and management letter.

☐ **4.** Meet with the CFO/business officer for a plain-language explanation of the school's economic model.

☐ **5.** Understand unrestricted cash, debt, major capital obligations, deferred maintenance, and significant financial risks.

☐ **6.** Identify the three financial assumptions that would create the greatest institutional vulnerability if they prove wrong.

Enrollment & Advancement

☐ **1.** Review at least five years of enrollment by grade and total school enrollment.

☐ **2.** Review inquiries, visits, applications, acceptances, yield, reenrollment, retention, and attrition trends.

☐ **3.** Understand current financial-aid demand, discounting practices, and net tuition revenue at a high level.

☐ **4.** Review annual giving, participation, major-gift pipeline, campaign commitments, and restricted-gift obligations.

☐ **5.** Identify donors, alumni, feeder communities, or external partners requiring early relationship-building.

People & Leadership

☐ **1.** Review the organizational chart and the actual responsibilities of each direct report.

☐ **2.** Schedule individual meetings with every direct report during the first two weeks.

☐ **3.** Review current vacancies, searches, succession risks, and significant role ambiguity.

☐ **4.** Understand the employee evaluation, compensation, and professional-development systems at a high level.

☐ **5.** Obtain appropriate awareness of significant inherited personnel issues that legitimately require Head-level knowledge.

Program, Operations & Risk

☐ **1.** Review the academic calendar, master schedule, program structure, and major curricular or accreditation initiatives.

☐ **2.** Review key student indicators: retention, attendance, discipline, academic outcomes, and student-support demand.

☐ **3.** Review emergency, safety, crisis-communication, cybersecurity, and business-continuity procedures.

☐ **4.** Understand the major facility needs and deferred-maintenance obligations likely to require attention.

☐ **5.** Obtain appropriate awareness of pending legal, compliance, insurance, accreditation, or contractual matters.

Transition Discipline

☐ **1.** Build the first-month listening-tour schedule and use a consistent question protocol.

☐ **2.** Create a private Transition Journal with sections for Observations, Questions, Commitments, People, and Patterns.

☐ **3.** Prepare a one-page Pre-Start Brief identifying strengths, unanswered questions, risks, immediate priorities, and matters you will deliberately not change yet.

Before You Walk In

Before the first official day, you should be able to answer these ten questions with reasonable confidence:

☐ **1.** What is this school's mission, and where is that mission visibly expressed?

☐ **2.** What does the Board believe I was hired to accomplish?

☐ **3.** What does the school's financial condition appear to be?

☐ **4.** What is happening with enrollment and retention?

☐ **5.** What commitments has the institution already made?

☐ **6.** What are the most important unresolved strategic priorities?

☐ **7.** Who are the people on whom the institution most depends?

☐ **8.** Where are the most significant institutional risks?

☐ **9.** What do I still not understand?

☐ **10.** What must I resist trying to fix too early?

> **A useful final test**
>
> If you can answer those ten questions, you are not finished. You are ready to begin.

Your One-Page Pre-Start Brief

Three strengths I must understand and protect:

_____

_____

Three unanswered questions I must resolve:

_____

Three material risks or vulnerabilities to monitor:

_____

_____

Three matters I will deliberately not change yet:

_____

The five people I most need to understand during Month One:

_____

_____

The SOS Day-One Leadership Framework

Phase	Timing	Primary Work
UNDERSTAND	Before Day One	Mission • Governance • History •

		Commitments • Finance • Risk
LISTEN	Days 1–30	People • Enrollment • Finances • Leadership • Faculty • Parents
DIAGNOSE	Days 31–60	School Health • Risk • Decision Rights • Quick Wins • Operating Cadence
ALIGN	Days 61–100	Priorities • Ownership • Measures • Communication • Accountability • Sequencing
EXECUTE	Day 100+	Milestones • Review • Learning • Leadership Development • Governance • Year Two

This checklist is adapted from the framework in Day One as Head of School: A 100-Day Launch Playbook for Independent and Faith-Based School Leaders. The complete book explains the judgment, questions, and leadership disciplines behind each item.

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