

**Insert Name of School or Department Here**

Principal & Central Office Administrator Transition Plan

***Incoming Administrator****: <Insert Incoming Administrator Name Here>*

***Outgoing Administrator (s)****: <Insert Outgoing Administrator Name Here*>

Insert Date of Transition Plan Submission

**Insert Name of School Here**

Principal Transition Plan

## General Responsibilities of Outgoing Principal

* Communicate the change in writing to the faculty and school community
* Complete all administrative duties for the remainder of the school year including performance appraisals, budgetary matters, and improvement plan reporting
* Set up the Incoming Principal for success by:
	+ Providing them access to all relevant information, files, records, contact, and passwords/security codes
	+ Sharing any commitments or promises made to the school or parent community
	+ Partnering with them on key decisions impacting the transition year
	+ Making them aware of high-priority issues
	+ Maintaining a positive dialogue with all stakeholders

## General Responsibilities of Incoming Principal

* Visit the school
* Meet with key stakeholders (see ***Page 7-10*** for specific expectations)
* Conduct a thorough review of all relevant information, files, records, reports, and data (***Page 5***)
* Work with Outgoing Principal and central office administration to develop a thorough *Principal Transition Plan* using the planning checklist on ***Page 3*** as a guide.

***Gather and Analyze Information***

***Key Contacts***

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| *Name and Role* | *Contact Information* |
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***Planning Checklist (Environmental Scan)***

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| **School Performance*** + School Improvement Plan (SIP) & Other Internal Goals
	+ Members of School Improvement Team (SIT)
	+ Current and Historical Academic Progress Data
	+ Climate Data & Issues
	+ Know Community Matters
	+ Special School Awards and Distinctions
	+ TPA
 | **Notes:** |
| **Demographics*** + Enrollment
	+ Makeup by sub-group
	+ RTI/Intervention/Prevention
	+ Gifted
	+ Transience
 | **Notes:** |
| **Climate/Culture*** + School History
	+ Traditions
 | **Notes:** |
| **Staffing*** + Teachers/Assignments
	+ Specialists
	+ Administrative
	+ Instructional Coaches
	+ Classified
	+ Leads/Teams
	+ SBIT
	+ “Dynamics” to Consider
	+ Volunteers
 | **Notes:** |
| **Parents*** + PTO
	+ Other Parent Liaisons
	+ Key Known Issues
	+ Family Services
	+ Custody Matters
 | **Notes:** |
| **Curriculum/Assessment/Instruction*** + Key Areas of Focus
	+ Professional Development Plans/Issues/Needs
	+ Maturity of FQL Implementation
	+ PLC Considerations
	+ Learning Walk Trends
 | **Notes:** |
| **Administrative*** + Master Schedule
	+ Crisis Plan
	+ Discipline
	+ Attendance
	+ Bus List/Schedule
	+ Feeder Pattern Considerations
	+ School Board Representative
	+ Central Office Liaison
	+ Professional Network (Mentor, Colleagues)
	+ Community Partnerships
	+ Legal/Policy Matters
 | **Notes:** |
| **Fiscal*** + Budget
	+ Bookkeeping
	+ Grants
	+ Credit Cards/Bank Accounts
	+ Donations/PTA/etc.
 | **Notes:** |
| **Communication*** + Key Contacts
	+ Welcome Letters
	+ Back to School Night
	+ BbConnect
	+ Email Distribution Lists/List Serves
	+ School Web Site
	+ School Newsletter
	+ School Press Releases
 | **Notes:** |
| **Building, Support Services & Technology*** + Floor Plan/Map
	+ Known Building Issues/Renovations Planned or In Progress
	+ Traffic Circulation
	+ Cafeteria/Child Nutrition
	+ Technology Inventory and Infrastructure
	+ Media Services
	+ Telephone/Cell/Fax Services
	+ Playground and/or Athletic Fields
	+ Health & Safety Inspections
	+ Security System
	+ Building Rental Considerations
	+ Exemplary Learning Spaces
 | **Notes:** |
| **Sports & Extracurricular*** + Sports
	+ Clubs
	+ Programs
 |  |
| **Other** |  |

***Suggested Documents/Information for Review (Environmental Scan)***

Principals are encouraged to review the following documents/information in preparation for their transition:

* School Improvement Plan
* School Report Card
* Formative & Summative Assessment Data Master Schedule
* Staffing Plan
* Crisis Plan
* Financial Reports
* Staff Handbook
* Student Handbook
* School Map
* Bus Schedule
* Bell Schedule
* School Calendar
* School Web Site
* School Newsletter
* Climate Survey Results
* PLC Minutes
* PTO Minutes
* Student Council Minutes
* Division Policy
* IEPs and SBIT Documentation
* DRT Reports
* SOL Testing Plan
* Additional State Reports
* Additional Survey Data
* Seed Project Updates (if applicable)
* Program Evaluation Results (if applicable)
* Parent Portal Usage (if applicable)

**SWOT Analysis**

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| ***Strengths**** What are our strengths?
* What advantages to do we have to help us overcome our challenges?
 | ***Weaknesses**** What are our challenges and areas needing improvement?
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| ***Opportunities**** Where can we change our challenges into strengths?
* What areas for improvement remain unaddressed?
 | ***Threats**** What are our barriers to progress?
* What challenges do we foresee in the future?
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***My School’s Key Communicators – People who influence Opinion***

Identify the people who are community leaders, who have strong opinions (positive OR negative) about your school/education, who are “always in the know”, who possess resources or means to provide information to others, whose opinion is respected and repeated, who may be your harshest critic or “most difficult” naysayer, who are seen as leaders or who can sway others. These are people you should be sharing information with first.

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| Internal (within your school) | External (in your community) |
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***Places of Influence in My Community***

Places in your immediate attendance area that are “community spots”, such as municipal buildings, waiting rooms of doctor’s offices, auto shops, libraries, senior citizen centers, grocery stores, nursery schools or child care centers, etc. Also list workplaces where many of your parents work.

These places should be part of your communications efforts as they are an opportunity for people in your community to learn more about your school.

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| Place | Location |
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***Develop and Implement Plan***

***Communications Plan***

To build a shared vision for your school, it is important to proactively implement a plan for communication and collaboration. Principals entering a new school are expected to:

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| --- | --- | --- | --- |
| Message**(WHAT?)** | Stakeholder Group **(WHO?)** | Method**(HOW?)** | Date**(WHEN?)** |
| *”Building Community”* meeting with every staff member | School faculty and staff | Small groups of no more than 10 | Within the first 90 days of the school year |
| *”Building Community”* meeting with at least 10% of parents | At least 10% of parents from a cross-section of the student body | Small groups of no more than 10 | Within the first 90 days of the school year |
| *“Building Community”*Meeting with at least 10% of the students *(representing a cross-section of the student body)* | At least 10% of the students *(representing a cross-section of the student body*) | Small groups of no more than 10 | Within the first 90 days of the school year |
| *Plus/Delta Report* Conduct a plus/delta of the meetings and summarize a report to the community. | Entire school community | School announcements, newsletter, web site | Within the first 90 days of the school year.  |

***Building Community***

Use the following as guiding questions for *Building Community:*

1. At our school, I am especially proud of: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_
2. I wish more people knew the following about our school:\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_
3. The most misunderstood items about our school are:\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_
4. What do you perceive as barriers to improving communication at our school?
5. How can these be overcome?

**Next steps:**

1. Conduct a Plus/Delta
2. Share the results with students, teachers, staff, and parents.
3. Follow up on “brag” items by highlighting in newsletters, websites, media, other tools.
4. Follow up on misunderstood items with communications plans to address
5. Follow up on improvement suggestions with communications plans and take action.

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| **Plus (+)**  | **Delta ( )** |
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Use the following table to document the details of your two-way communications plan. Include key meetings and focus groups.

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| --- | --- | --- | --- |
| Message**(WHAT?)** | Stakeholder Group **(WHO?)** | Method**(HOW?)** | Date**(WHEN?)** |
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***Key Timeline Activities***

Use the following table to document the key activities of your overall transition plan.

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| Key Activity**(WHAT?)** | Purpose/Rationale **(WHY?)** | Date/Timeframe**(WHEN?)** |
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