

A Graceful Exit

A superintendent retirement plan to consider | *Dr. James Fitzpatrick*



As a superintendent in the School District of Fort Atkinson for 14 years, it was important to me that I gracefully exited this role when I was ready. This meant carefully timing my retirement announcement, completing my tasks before my final days, and establishing my post-superintendency plan.

This isn't a process that happens overnight; rather it takes time and careful planning. In fact, if you are a superintendent who is considering retirement within the next five years,

I would recommend planning your transition.

■ Making the Decision

Upon reaching the age of 60, I still felt energetic enough to continue as superintendent. However, I also knew I was fooling myself to think I could continue the demanding schedule and workload of a superintendent. I have known superintendents and principals, who stayed too long, only to be remembered more for mistakes or poor decisions they made in their final year, than for the stellar leadership that should have defined their legacy.

At the same time, retiring doesn't mean you have to completely remove yourself from

school leadership work. Before retiring, I knew I wanted to return to the University of Wisconsin and secure an educational leadership appointment. Working with aspiring principals and superintendents and giving back to the profession is something I wanted to do, just as my mentors had for me.

LEADERSHIP TRANSITION

Steps to take to welcome and set-up new superintendents for success

Whether a district's superintendent is retiring or leaving for another opportunity, there is much work that school district leadership can do to ensure a smooth transition from one superintendent to the next.

WASB Consultants Louis Birchbauer and Dennis Richards presented a special session on this topic at the Legal and Human Resources Conference in February in the Wisconsin Dells. Birchbauer and Richards lead the WASB Superintendent Search Services team and are available to help WASB member districts conduct a superintendent search and ensure a smooth leadership transition.

As school leaders know, strong leadership is critical for a district's success. Selecting a superintendent requires thoughtful deliberation by the entire school board and adequate time should be given to the board to make its decision.

Before a candidate is offered the job, school leaders should have a plan of action to address leadership transition. In fact,

Birchbauer says, "Your transition period starts as soon as your superintendent announces they are leaving the district."

In ideal situations, outgoing superintendents give their school boards adequate time for the search and transition process.

"The more the superintendent trusts the board, the earlier they will let the board know," Birchbauer says.

In some situations, a superintendent will let the board know their plans of leaving one year in advance. However, most districts are given much less time than that.

Leadership transition will look slightly different from district to district, but overall, once a new superintendent is hired, there are several steps any district should take to transition the new superintendent.

One of the first steps is to announce the new superintendent. While this may seem like an obvious step, district leadership sometimes overlooks or doesn't give this step the

■ Informing the School Board

The timing of informing the school board of your decision is a key consideration. In my case, I wanted to be fair and upfront with our board. As you know, one of the most important responsibilities local school boards have is selecting a superintendent.

I announced my retirement plans in October. We were well into the first quarter of the school year, and had a good start on our plans and initiatives. In Fort Atkinson, this gave the board enough time to select my successor by March, which allowed for a smooth and successful transition period. (The timing of when you announce your retirement is important — see below for more information.)

I did offer the school board a timeline for the new superintendent search that I thought might be helpful. The timeline included hiring a consultant, establishing timelines for posting the position, screening candidates, selecting finalists, and ultimately hiring the next superintendent. From that point on, I excluded myself from any further involvement in choosing my successor.

■ The Search

The Fort Atkinson School Board handled their search and hiring process extremely well. With the help of WASB consultants Louis



Birchbauer and Dennis Richards, the board president and board members actively sought out to publicly engage citizens per the selection of the next superintendent. Five full months was just the right amount of time per the due diligence needed in selecting the right candidate.

In my experience, the longer a search goes on, the more susceptible it is for misinformation to spread

attention it needs. An announcement needs to be given to all district staff and also to your community and local media. A proper introduction of the new superintendent to your community is an important step.

After announcing the candidate, school leaders should schedule a meeting with the new superintendent to go over the district's vision and direction.

"Once you have selected your superintendent, immediately sit down with them and lay out district goals," Richards said.

If circumstances allow, it can be valuable for your new and outgoing superintendent to meet and discuss the job. Again, this may not always be an option, but if it is, it can help orient the new superintendent and give him or her valuable information about the job. In some instances, a district may be able to have a window of overlap between the incoming superintendent and the outgoing superintendent to help ease the transition. However, this may not be a viable option for districts because of the financial aspect and also because of criticism it may draw from the community.

Leadership transitions are designed to serve the school community, the school system, and the new employee. A successful leadership transition requires support for new leaders and their followers along with a focus on trustworthy communication and clear decision-making processes. No matter how your district approaches a superintendent transition, the school board needs to support the leadership transition and the public should be informed of the transition plan.

■ Four points to remember about an individual's transition:

- A leadership transition is among life's most difficult personal challenges.
- A successful transition requires different ways of thinking for the individual if moving up within a school system or to a new level of leadership. The biggest shifts in thinking are in the areas of communicating, planning, and building the team.
- Leaders indicate that dealing with internal politics is a significant challenge.
- Leaders in transition sometimes look for support in unexpected places. □



and candidates ultimately feeling vulnerable per their job security with their current school districts. A board must be focused and sensitive in their search and hiring process. Again, as the retiring superintendent, I believed the best role was to be totally removed from the process. Even if you have a great relationship with your school board and are requested to participate in the superintendent search, it is very important to remain separate from this process. Let the board do its work.

■ Resisting Lame Duck Label and Getting Closure

The thought of leaving any tasks undone before I retired haunted me. Some retiring superintendents, who

are exhausted, and counting the days, openly admit they are side-stepping some of the big issues and leaving them for the incoming superintendent. It was very important to me that all labor agreements were resolved and the next strategic plan was approved and adopted. The new superintendent, amidst all other transition changes, would not have to worry about completing these tasks.

Furthermore, I wanted to make sure the annual meeting was set, the budget was balanced, the proposed property tax levy was favorable to taxpayers, and teaching positions sorely needed for programs and keeping class sizes reasonable were approved prior to my leaving. In short, I wanted to leave the district in sound shape for my successor.

As your retirement draws near, both internal and external stakeholders will ask for favors — these may range from letters of recommendation, to hoping you will give support to some of their special interests before you leave. Similar requests came during my superintendent tenure, but be prepared for many more as people know you are on your way out.

■ Transitioning with Your Successor

In addition to updating the district's superintendent job description, I compiled a list of all monthly tasks. I thought back to my first year as superintendent and remembered worrying that I might make a major blunder or neglect to handle an important task. In creating the list of monthly tasks, I hoped to help the incoming superintendent.

After a grueling finalist selection process, the principal of Fort Atkinson High School, who had served in that role with distinction for 13 years, was selected to be the new superintendent. Hiring internally helped make the transition process easier. We already had a standing luncheon meeting every second Friday of the month to discuss high school issues. Now these meetings, in addition to high school matters, included transition topics and all pertinent matters pertaining to his assuming the superintendency and transitioning to central office.

However, if an outside candidate had been chosen, I would have followed a similar transition plan. If distance would have been an issue, email or phone conferences could have been planned. I believe a retiring or outgoing superintendent can be a great asset to an incoming superintendent and should do whatever possible for the school board, and the learning community, in assuring a smooth transition.

■ Cleaning out Your Office

I had plenty of time to think about cleaning out my office and I waited as long as I could. I think that it is important to remain active in your position over the course of the final weeks — you don't want to be in danger of becoming a 'lame duck.' However, at the same time, you want to get out of your successor's way. He or she is sure to have some angst in making the transition and will probably want to get into the office as soon as possible. In your

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final weeks and days, including your last day, you will likely have many people stopping by wishing you well and making final requests.

However, one thing caught me off guard. I did not foresee how emotional I would feel. I wanted to be alone the last few hours of my last day after people left work. It really hits you that this is it as you put your keys on the table for the last time. Before leaving, I jotted a short handwritten note for my successor wishing him the very best. I finally left my office at 9:30 pm on my last day Friday, June 28, 2013.

■ Post Retirement Plans

I didn't want to begin planning what to do after retiring from the superintendency. Rather, I wanted the next stage in my career to be something I planned for in advance.

Advice I received from retired superintendent friends varied from telling me to take a year to decom-

press to suggestions of taking time to travel, golf, read, and take-up some hobbies. I love to read and travel so there was a lot of appeal per those suggestions. As I write this piece, I had three months to decompress and my wife and I had a wonderful vacation trip.

I also taught a politics of education course at the University of Wisconsin in the fall semester of the 2013-2014. I continue to enjoy opportunities to teach and train those interested in a career in educational leadership and administration.

Retiring from the superintendency is a big step and taking control of your exit plan is an important part of the process. I left very gratified that I would be remembered fondly. To me, that is the ultimate satisfaction any public servant can hope for! ■

Fitzpatrick served as superintendent in the School District of Fort Atkinson for 14 years.

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