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First Families: A Toolkit for Trustees

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The inception of a new head marks a period of transition for the board, the faculty, the students, the parents, and the head. Though little has been written on it, numerous programs exist to help heads prepare for and assume headship. In contrast, virtually no attention has been given to the transitions of the spouses and children of heads. There are, however, two other kinds of first families that face similar challenges: those of clergy and those of college presidents. The literature on these first families closely parallels the information gleaned from meetings and discussions with independent school families: the needs of all members of the first family must be addressed in order to ensure a successful headship. This article, written for trustees, heads, first families and, indeed, anyone concerned with ensuring a successful headship, is devoted to describing the head's and the first family's journey.

The article describes how the head and the first family can successfully navigate a safe passage to a gratifying headship. First, it describes why boards should pay attention to the needs of the first family. Second, it describes the environment that the new head enters, the kind of person who is drawn to independent school headship, and the nature of the job. Third, it articulates the needs, challenges, and pressures of being a first family. Fourth, it discusses how boards can ensure a "good fit" between the needs of the first family and the school. Finally, it details the steps that boards can take to ensure a smooth transition for the "first family." Each will be addressed in turn.

Why are first families important?

There are many reasons why boards ought to attend to the needs of the first family. These include head morale and retention, organizational morale, promoting a healthy school culture, and building an atmosphere of inclusivity. Positive head morale and low turnover are important to the health of any school. It is no revelation that heads do their best work when their families are thriving. A head whose family is comfortable in his or her new environment is free to focus on the concerns of the school. Conversely, a head whose spouse is unhappy or whose children are having social or academic difficulties must make their needs a top priority. And, if the family's needs are compelling, he or she may search for another position. In short, happy families lead to happy heads. Unhappy families can culminate in head turnover.

A leader's morale is best when family life is going well. But, beyond this, a leader's morale has a profound effect on organizational morale. An arsenal of organizational and family systems literature suggests that strong leadership leads to strong organizations. Consistent with this contention, in independent schools when things are going well at the helm, faculty and students thrive. It is in the context of strong leadership that one witnesses innovations, a strong school community, and an ethos of respect and tolerance. In contrast, dysfunctional behavior and demoralization among faculty and students may reveal trouble at the top. It is not that a head with significant family problems cannot be a good leader. Rather, significant family concerns can siphon off energies that could be devoted to school.

Attending to the needs of the first family not only promotes a healthy school culture, it also sends an important message to the family as well. It says, "Welcome. We care about you. We care about your needs. You are a part of our community. Take off your coat. Unpack your bags. Stay a while." Similarly, it sends a powerful message to the school community regarding the character of the school. It says, "We mean it when we talk about community." And it says, "Here at our school, we respect and support the institution of the family." It is a message that will be remembered in the future if faculty and students find themselves facing their own family struggles. They will view the school community as an accepting place where they, in turn, can find support.

This sort of welcoming, inclusive stance serves as a role model for all school community members. It also speaks volumes about a school's climate and its character. Faculty and students will observe how the first family is handled and, on the basis of their observations, they will make inferences about the board's position on gender roles, expectations, and equity. The handling of this delicate situation will provide the scaffolding, albeit probably unconscious, through which the board and the school will be viewed. When the spouses of heads are valued and treated with consideration, faculty and students will consciously or unconsciously decode the inherent messages about their own value, worth, and status.

It should be noted that this is an important, formative period for students. As students develop their own sense of gender identity and gender roles, they will internalize what they observe in their environment. If the head is a man, girls may identify with the first lady; thus, how she is treated may have a positive or negative impact on how they think about themselves and their futures. Similarly, boys, who may identify with the head, will have an early lesson about how they might think about roles and relationships in their own future families. Of course, when the head is a woman, girls may seek to emulate her, and boys will be exposed to other possible options.

The "case" for the first family has been reviewed. However, in order to understand their needs, it is important to understand the environment into which the new head enters.

The zeitgeist into which the new head enters

Headship is an exciting and challenging task. A head has the opportunity to be a visionary. He or she can collaborate with colleagues to create an ideal educational environment. He or she can

provide leadership in building a trusting, supportive school community. But, these opportunities are not without their challenges. In general, and especially in boarding schools, headship is a 24/7 job, replete with endless performances, sports events and, yes, crises. Even if the Head has significant support from his or her spouse, a head entering a new school faces a major challenge. The Head must quickly establish credibility as a strong and competent leader while simultaneously ensuring his or her family safe passage in their new environs. Three things make this a daunting task: the head's personality, the nature of the job, and the needs and pressures associated with being a member of the first family.

The kind of person who is drawn to independent school headship

In general, heads are hard-working people, with a great capacity for empathy and a genuine concern for the community. While these may be wonderful qualities in a leader and in a spouse, they leave the first family open to special challenges.

People who are drawn to headships often tend toward workaholism. Moreover, when faced with great pressure, they sometimes manage their anxiety by working even harder. Like most people in the independent school community, heads are empathic. They are concerned about and attuned to the welfare of others. When someone is hurting, in trouble, or in need of support, they want to help. They extend themselves for others, at times subordinating the needs of their own family to the needs of the school community. Most heads view building a healthy, supportive community as a vital part of their role. Some fortunate ones may be trying to relive their own wonderful independent school experience as a student. Others may be trying to provide for the next generation what they lacked. Many view headship as a "secular ministry," and, they see themselves as answering "the call." They think of faculty more as parishioners or family members than as employees or colleagues, and the school as more of a place of spiritual growth than a place of work. Certainly, you will never hear a head say, "It's just a job!"

The nature of the job of headship

Dr. Lynn Friedman, the first author on this article, has explored the challenges of headship in another article. To summarize, heads are not always hired just because the incumbent head is retiring. Rather, with increasing frequency, they are brought in to replace a head who has, officially or unofficially, been discharged. Sometimes, the school community into which the head enters is a troubled one, and boards, faculty, parents, and students may turn to the new head for an immediate "rescue." A new head may face unrealistic, impossibly high expectations. He may be expected to effortlessly fix heretofore irresolvable organizational problems without making anyone uncomfortable or unhappy. Most importantly, the head is expected to be available at all times. Add to this challenge the fact that the faculty may, understandably, be quite anxious about where it stands with the new head. Faculty members harbor hopes, fears and expectations, and they want to know that their sense of security will not be disrupted. Consequently, the head is placed in a most awkward position: the Head is to make change, without making anyone change. When the head inevitably disappoints someone, he or she becomes vulnerable to criticism and censure.

To make matters more difficult, heads are not always alerted to individual and organizational problems prior to assuming the headship. Prudence dictates that, early on at least, the head keep his or her own counsel. Therefore, the head is in a position wherein he or she must make

important decisions, often without benefit of reliable sources of information or time for reflection. The Head needs support from people he or she can trust completely. Moreover, during this period of transition, the Head and his or her family must be the consummate diplomat(s), refraining from criticism and building good relations with as many people as possible in their new home. It is into this delicate, high-demand, high-expectation context that the head brings his or her loved ones. The Head needs support from them, but they are not without their own needs and feelings.

The needs, challenges, and pressures for the first family

As anyone who has ever relocated can tell you, moving a family, no matter what the reason, is never easy. It requires considerable adjustment on the part of all family members.

Upon moving, the head is immediately catapulted into the exciting challenges of the new job.

In contrast, sometimes by design and sometimes by happenstance, the spouse is left to deal with the transition. Any new job has a profound effect on a marriage. Both parties have to adjust, taking into account each other's needs as well as their joint needs for closeness. Any healthy couple will have both hopes and apprehensions about how their move will play out. Will they still find time for each other? Both may be worried that the head will not have enough time for family life. Other feelings, both conscious and unconscious, may be stimulated. While the decision to accept the headship may have been a family one, that does not mean that it was one that was achieved without ambivalence. The spouse or partner may, albeit perhaps unconsciously, have lingering feelings of resentment about the sacrifices inherent in such a move.

In any case, even if both partners are excited and happy about the move, it will still entail some anxiety and some losses. The head's spouse may have significant emotional and professional investments in the former location. He or she is probably leaving friends and community ties. Moving disrupts a spouse's career, whether he or she works exclusively in the home, works in the school, or has an independent career outside of the school.

All head spouses, like clergy spouses, are aware that their partner is constantly struggling to please two mistresses. A spouse may be apprehensive about the demands of the headship, particularly when the new position is a significant promotion for the Head. Stay-at-home spouses with young children may lack the stimulation of adult company, and the opportunity to make new friends. For those who are school professionals, the move may mean a change in status. Working at the new school may not be possible, depending on school policies and vacancies. Where it is possible, it may not be desirable. Working for another nearby school may carry its own set of complications. If he or she has a career in another field, the spouse may be job-hunting or assuming a new position with its own, very real, work-related stresses. Depending on the job market in the new location, the spouse may have to settle for a lesser position.

Children can add more stress and demands on parents already in a difficult situation. They may be leaving a place where they have been happy. Younger children may be relinquishing

comfortable day care arrangements. Older children may have been happily ensconced in school, friendships, and their daily routine. Their parents may have considerable concern about uprooting them.

Some may have special social, learning, athletic, musical or extracurricular needs. Both parent and child may be very apprehensive about a shifting to a new school that may not be as effective in addressing those needs. Will the child attend the head's school? If not, are there funds available for placement in another independent school? Will the child be admitted elsewhere, particularly if the decision to move has been made late in the year? Will the child attend public school? Are the public schools good? Where there has been a previous failure in addressing the child's needs, both parent and child may harbor high hopes that these needs will, at last, be met. Of course, the new school may open up new possibilities. But, even when a move is clearly for the better, uncertainties always exist.

Beyond any academic/extra-curricular needs, children most likely have mixed feelings about moving. They probably had little or no choice about the matter. All children will miss their friends and may be sad about leaving their school, but this is particularly hard on adolescents in high school. It is difficult for parents dealing with their own moving challenges to have to deal with their children's apprehensive, angry, or resentful feelings. First family members reading this article should take heart: The complaining usually stops about the same time that the child makes new friends.

How do the demands of headship create significant pressures for the first family?

It seems an unfortunate paradox that at a time when a family is at its most vulnerable, its members may have to make the most difficult adjustment of all: learning to tolerate public scrutiny. Suddenly, the partner is not merely a spouse and the children, not merely children. Rather, they are now members of the first family, and are always expected to be on their best behavior.

And this is not all. Like the presidential counterpart, the head's spouse may be expected to work tirelessly, without compensation or recognition. The spouse also must learn how to manage the stature and influence of the role. People may embrace the spouse with less than pristine agendas. The spouse will discover, like it or not, that he or she is viewed as the voice piece of the head, and opinions he or she expresses about school matters will automatically be attributed to the head. Sharing last night's idle dinner conversation with a school friend may be imprudent. Similarly, confiding everyday anxieties, with school friends, may be a risky business. Most challenging, the spouse is somehow expected to know this without any training whatsoever.

Some may envy the privileges that come with the role. However, often his or her lot is not an easy one. The head's spouse may be expected to entertain, host overnight guests, and appear for an array of campus events. If he or she fails to comply with these expectations, and misses a significant event, he or she may be the object of criticism. Still worse, these expectations may never have been made explicit. Even a spouse who is devoted to being a member of the

"supporting cast" is not exempt from critique and envy. Moreover, accessibility makes him or her ripe for exploitation. Faculty (and their spouses) may approach the head's spouse in an attempt to solicit information about or to curry favor with the head. The spouse is expected to be aware of and sensitive to these (albeit inappropriate) socio-political nuances and to handle them with diplomacy and tact. It should be noted that even the head's spouse with a career of his or her own does not escape unscathed. In fact, he or she may be both roundly criticized and privately envied for pursuing his or her own interests.

If the head's spouse is in a difficult predicament, the head's children find themselves in a more challenging spot. As if moving itself weren't difficult enough, children now find themselves in the public eye. Living in a fishbowl isn't easy, particularly when they may have complicated feelings about the role of the parent who is head. If the parent is a first-time head, children may lament decreased family time. They may resent that, at times, the needs of the school will take precedence over their own. They may complain that Mom or Dad couldn't attend their game or performance because he or she was at a school event.

In some locations, children are expected to attend the school where their parent is head even when it is not the optimal place for them. Teachers may have the unrealistic expectation that the child be a model student. At times, it may be very hard for teachers to "forget" that this is the head's child. Less experienced teachers might provide moment-to-moment accounts of the child's behavior and mishaps to the head. Thus, the head's children may find that their parents are being judged by their behavior. Normal adolescent highjinks are now a reflection on their parent's professional performance. As anyone who has ever parented an adolescent knows, this not only creates enormous pressure for the teenager, it gives him or her enormous power over the parent, both of which are detrimental. In addition, adolescents find themselves in the awkward position of having their parent discipline their friends.

How can the needs of the first family be addressed? Creating a "transition model"

The first family

1. Work with the first family to create policies that respect the need for privacy and for family time. If the head's home is on campus, such guidelines might specify "call first, always" policy before dropping by. Policies should address how late and how early one may call as well as under what circumstances the head may be contacted on weekends and holidays.
2. Recognize that every first family has the need to come first sometimes. Work with the head to take steps to ensure that this can happen.
3. Don't assume that the residence of the first family will function as the campus hotel unless that is part of the written contract, and there is adequate household assistance for the spouse.
4. Create supportive structures for the first family. Provide excellent health and mental health family insurance coverage. If the school policy limits this type of care, find another way to fund it.

The head's spouse

1. Bring the head's spouse to town prior to tendering an offer.
2. Some spouses welcome the role and some do not. In either case, the head and spouse ought to know, in advance of accepting the offer, whether it is a "package deal" and, if so, what the specifics of the package are. There are probably no "right" or "wrong" head/spouse job configurations; different structures work well in each setting and for each family. But it is essential that any expectations of the first family be explicitly articulated as a part of the job offer. Create a written job description for the head's spouse. Is the spouse expected to entertain? If so, is there an entertainment budget? Is there a decorating budget? Is the first family expected to entertain overnight guests? If so, is there a budget for household help? Will the spouse be compensated for these activities? Is the spouse free to refuse without repercussion?
3. Address the career needs of the spouse. If the spouse is leaving a job, provide all possible assistance to help find a comparable position in your locale. Establish partnerships and reciprocal agreements with local industry and academic institutions for this purpose. This will not only make it easier to recruit a new head, it will reveal the board and the community as both savvy and welcoming. It should be noted that these same contacts can be used to help faculty spouses get jobs.
4. Introduce the head's spouse to people in the school as well as in the larger community. Talk with him or her about his or her interests, needs, goals and try to help make useful connections.
5. Provide information about the new community, including the names of doctors and professionals, restaurants, grocery stores, etc.
6. Welcome the head's spouse into the community as an individual, not just a trailing spouse. Invite him or her over. Include the spouse in events. Don't embarrass the spouse by digging for information about the head or treating him or her as an appendage.

The first children

1. Bring the family to town prior to the move. Arrange for the head's children to meet other children (both at the school and in the larger community) prior to the move. In that way, one can generate excitement about the move. Show them some of the interesting things in the school and in the community for someone in their age group.
2. Ideally, first families should be free to choose the optimal school for their child without having to account to anyone for their choice. To expect otherwise can create a host of complicated feelings and resentments on the part of all involved.
3. If children are expected to attend their parent's school, it is essential to learn about any special needs (i.e. learning specialists, psychologists, tutors, etc.) prior to the move, and anticipate the budgetary impact of such needs It is important to evaluate whether the school is academically appropriate. If the child is not expected to attend the school, is there tuition assistance available so that children can attend another independent or parochial school? It is advantageous to have reciprocal agreements with other independent schools in the area for this purpose.

4. Without asking questions, discretely make information available about health, learning and psychological resources.

The head

1. Recognize that this is a challenging position and a stressful time. Take steps to reduce the stress. Provide health club memberships or similar supports.
2. Encourage the head to seek out organizational consultation so that he or she can reduce the stress of transition. Make funds available for this purpose.

Are you a trustee? Do you have some questions or suggestions? This work is part of an ongoing effort to understand and be responsive to the needs of the first family. If you have suggestions, ideas or concerns, please call or write to us. Let us know what worked well at your school and what didn't. Contact us at: drlynnfriedman@verizon.net, (301) 656-9650.