So you are taking on an assignment as a principal at a new school. Experienced principals advise that you should not make changes until you gain some familiarity with the school. So what is your entry plan?

Becoming a principal at a new school is exciting, it can be equally scary. You should use a systematic approach in your first few days and weeks on the job to expedite your learning, make the change in leadership as smooth as possible for all parties, and minimize the chances of having to make quick decisions without the necessary background knowledge.

The following checklist can be used to approach your new position in a systematic way. Of course, your specific circumstances will all enter into your decisions about the tasks that you need to do and the order in which they should be done. We suggest using this checklist as an organizer to check off and date the tasks as they are completed. It may be advisable to date each task as it is completed. This will serve as documentation that you approached your responsibilities in a reasonable and prudent manner.

By accomplishing these tasks, you will begin to feel at home. You will meet important people and they will get to know your leadership style and your expectations. Most of all, you will be spending your time productively learning about your new assignment and the people who will help you run an excellent school. Good luck!

1. Review all personnel records. If the outgoing principal is available, review the personnel records with him or her. Be sure to ask whether there are any entries in a “mind jogger file” that you should be aware of. Completed

2. Conduct a safety inspection of the building. It is a good idea to conduct this inspection with another person who is not familiar with the building. Fresh eyes often see things that are overlooked by someone who is in the building every day. Completed

3. Review all safety drill procedures (e.g., fire, severe weather, bomb threat). Completed

4. Meet with your crisis response team and review the procedures in your crisis management plan. Completed

5. Contact leaders of parent and booster groups to introduce yourself and to schedule a future meeting for general discussion purposes. Completed

6. Review student and teacher handbooks. You should pay special attention to grouping, grading, and discipline policies because these will likely be some of the first issues that you confront. Completed

7. Review the procedures for dealing with petty cash, student funds, and so on with your office staff. Completed

8. Send a letter of introduction to all the parents of the students attending your school. A similar letter of introduction should be sent to community leaders. Completed

9. Schedule a series of informal meetings with your custodial, secretarial, cafeteria, maintenance, and transportation staffs. These should be individual meetings to give each group time to meet with you and discuss issues that may be a unique concern to them. Listen to any concerns that surface and make sure to keep notes. It may also be helpful to have your secretary attend with you and take notes. Completed

10. Schedule a series of informal meetings with key personnel leaders, such as social workers, special educators, counselors, and nurses. Again, these should be individual meetings. Completed

11. Attend meetings of the academic departments. Observe what they are working on and their procedures. Ask what they have recently accomplished and what they wish they had accomplished. Completed

12. Review and analyze student assessment data. Find out if action plans have been written to address deficiencies. Completed

13. Conduct a meeting with student leaders such as student council officers and officers of student clubs. Completed

14. Make contact with representatives from the teachers’ union. This can be done through a letter of introduction or through an informal meeting. Completed

15. Review the class schedule and make sure you understand how it works. If you enter the job in the summer and need to develop a class schedule, be sure to review the prior year’s schedule with someone who is familiar with it. In most cases, there isn’t a major alteration of schedules from year to year in terms of the overall structure. Completed

16. Develop an emergency phone chain for the building staff. You should consider having this phone chain interface with a chain that includes parents. Completed

17. Review employee contacts (e.g., teachers, custodial staff, and secretarial staff). Completed

18. Review the school board policy manual. Completed

19. Ask your office staff if pictures of faculty members are available. Study these so you will be able to recognize your teachers and address them by name. Completed

Robert L. Furman (furman@castl.duq.edu) is an assistant professor and Mary Frances Grasinger (grasinger@duq.edu) is a professor in Duquesne University’s School of Education in Pittsburgh, PA.