



The Research-Based Comprehensive Checklist for Principal Onboarding

A practical tool for building principal clarity, capacity, confidence, and retention

Designed for superintendents, cabinet leaders, principal supervisors, and district leadership teams

Inform. Influence. Inspire.

Why Principal Onboarding Matters

Effective principal onboarding is not a one-time orientation event. It is a leadership development process.

Research consistently shows that principals influence student learning, teacher effectiveness, school climate, staff retention, and organizational improvement. When districts invest in strong principal pipelines, clear expectations, mentoring, coaching, and ongoing support, schools are better positioned to improve and principals are more likely to stay.

This checklist is designed to help districts move beyond compliance-based onboarding and toward a research-based system of support that helps new principals lead with clarity, build trust, and improve outcomes.

How to Use This Checklist

- Use it before a principal begins to clarify expectations, context, systems, and relationships.
- Use it during the first 30, 60, and 90 days to guide listening, learning, system review, and focused action.
- Use it throughout year one to shape coaching, mentoring, professional learning, and supervisor support.
- Use the evidence section at the end of year one to determine whether onboarding produced clarity, trust, instructional leadership, stronger systems, and sustainability.

1. Before the Principal Begins: Establish Clarity Before Activity

Research connection: Effective principal preparation and support begin with clear expectations, role definition, and alignment to district priorities. Principal pipeline research emphasizes standards-based hiring, preparation, evaluation, and support (Gates et al., 2019; National Policy Board for Educational Administration, 2015).

Role and Responsibility Clarity

	Checklist Item
☐	Provide a clear job description aligned to district leadership standards.
☐	Clarify the principal's decision-making authority.
☐	Identify which decisions the principal can make independently.
☐	Identify which decisions require district consultation or approval.
☐	Clarify expectations for instructional leadership, operations, culture, family engagement, and staff supervision.
☐	Define what success looks like in the first year.
☐	Clarify the superintendent or supervisor's expectations for communication and follow-up.
☐	Identify district non-negotiables.
☐	Identify areas where the principal has flexibility to lead and innovate.

District Alignment

	Checklist Item
☐	Provide the district strategic plan.
☐	Explain the district's instructional priorities.
☐	Explain current district initiatives and why they matter.
☐	Clarify which initiatives are required, optional, paused, or being phased out.
☐	Share board goals and current district priorities.
☐	Explain how the principal's school fits into the larger district strategy.
☐	Clarify how principal performance will be evaluated.
☐	Provide the leadership standards or rubric used for principal growth and evaluation.

School Context

	Checklist Item
☐	Provide the current school improvement plan.
☐	Share recent academic achievement data.
☐	Share attendance data.
☐	Share student behavior and discipline data.
☐	Share student, family, and staff survey results.
☐	Share graduation, promotion, credit, or course-passing data where applicable.
☐	Share teacher retention and staffing history.
☐	Share special education, multilingual learner, and intervention data.
☐	Share master schedule, staffing assignments, and budget information.
☐	Identify major school traditions, events, and community

	Checklist Item
	expectations.
☐	Explain the school's recent history, including major successes, challenges, transitions, and unresolved issues.

Relationship Mapping

	Checklist Item
☐	Identify key district contacts.
☐	Identify school leadership team members.
☐	Identify assistant principals, deans, counselors, department chairs, and teacher leaders.
☐	Identify union or association representatives.
☐	Identify office, custodial, nutrition services, safety, and operations leads.
☐	Identify parent and community leaders.
☐	Identify influential staff members, both formal and informal.
☐	Identify community partners.
☐	Identify people the principal should meet early to build trust.

2. First Week: Orient the Principal to People, Systems, and Immediate Priorities

Research connection: New principals need rapid access to information, systems, and relationships. Early confusion around operations, authority, and expectations can reduce effectiveness and increase stress (Mitgang, 2007; Wallace Foundation, 2013).

Essential District Meetings

	Checklist Item
☐	Meet with the superintendent or direct supervisor.
☐	Meet with human resources.
☐	Meet with teaching and learning or instructional leadership.
☐	Meet with student services and special education.
☐	Meet with finance or business office.
☐	Meet with operations and facilities.
☐	Meet with technology.
☐	Meet with communications or public relations.
☐	Meet with safety or security personnel.
☐	Meet with assessment and data staff.
☐	Meet with legal, compliance, or policy support staff as appropriate.

Access to Core Systems

	Checklist Item
☐	Email and calendar access are active.
☐	Student information system access is active.
☐	Assessment platform access is active.
☐	Employee evaluation system access is active.
☐	Budget and purchasing system access is active.

	Checklist Item
☐	Discipline and attendance system access is active.
☐	Curriculum and instructional resource access is active.
☐	Special education and intervention platform access is active.
☐	Building keys, badges, alarms, and emergency access are complete.
☐	District communication tools and parent messaging systems are active.

Immediate Priority Review

	Checklist Item
☐	Review upcoming deadlines.
☐	Review current staffing vacancies.
☐	Review urgent personnel concerns.
☐	Review active parent or community concerns.
☐	Review current student safety concerns.
☐	Review any ongoing investigations, grievances, or sensitive matters.
☐	Review opening-of-school tasks or transition needs.
☐	Review emergency procedures and crisis response expectations.
☐	Review the school calendar and major events.
☐	Review budget deadlines and purchasing procedures.

3. First 30 Days: Listen, Learn, Build Trust, and Understand the System

Research connection: Effective principals build relationships, shape a shared vision, and create the conditions for adults and students to focus on learning. Early trust-building matters before major change efforts (Leithwood et al., 2004; Grissom et al., 2021).

Listening and Learning Meetings

	Checklist Item
☐	Meet individually with assistant principals or deans.
☐	Meet individually with office staff.
☐	Meet with counselors and student support staff.
☐	Meet with department chairs or grade-level leaders.
☐	Meet with special education leaders.
☐	Meet with multilingual learner staff.
☐	Meet with intervention staff.
☐	Meet with custodial and nutrition services leads.
☐	Meet with union or association representatives.
☐	Meet with parent leaders.
☐	Meet with student leaders.
☐	Meet with community partners.
☐	Visit classrooms informally.
☐	Attend school events, activities, or community gatherings when possible.

Listening Questions

	Checklist Item
☐	What is working well here?

	Checklist Item
☐	What are people most proud of?
☐	What should be protected?
☐	What needs immediate attention?
☐	What has been tried before?
☐	What has created frustration or fatigue?
☐	Where is there confusion or inconsistency?
☐	What do students need most right now?
☐	What do staff need most right now?
☐	What do families need most right now?
☐	What should I understand before making changes?
☐	Where are the strongest examples of great teaching and learning in this building?

Early Communication

	Checklist Item
☐	Send an introductory message to staff.
☐	Send an introductory message to families.
☐	Introduce leadership values and initial commitments.
☐	Communicate that the first phase will focus on listening, learning, and understanding.
☐	Establish predictable staff communication routines.
☐	Establish predictable family communication routines.
☐	Clarify communication expectations for urgent issues.
☐	Clarify how staff should bring forward concerns, ideas, and questions.
☐	Avoid making premature promises before understanding the system.

4. First 60 Days: Clarify Instructional, Cultural, and Operational Systems

Research connection: Effective principal leadership depends on instructional leadership, organizational management, school climate, teacher support, and the ability to align people, data, and processes around shared goals (Grissom et al., 2021; Marzano et al., 2005).

Instructional Leadership

	Checklist Item
☐	Review district instructional priorities.
☐	Review curriculum expectations.
☐	Review assessment expectations.
☐	Review PLC structures and expectations.
☐	Review intervention systems.
☐	Review classroom observation expectations.
☐	Review teacher evaluation timelines.
☐	Review professional learning plans.
☐	Identify current instructional strengths.
☐	Identify gaps in instructional consistency.
☐	Identify how learning targets, success criteria, aligned tasks, and assessment are being used.
☐	Clarify what high-quality instruction should look like across classrooms.
☐	Identify the school's strongest teacher leaders and instructional models.

Culture and Climate

	Checklist Item
☐	Review schoolwide behavior expectations.
☐	Review discipline data.
☐	Review attendance data.
☐	Review restorative practices, behavior response systems, or student support systems.
☐	Review student recognition systems.
☐	Review staff culture and morale indicators.
☐	Identify predictable points of friction.
☐	Clarify expectations for visibility and supervision.
☐	Identify opportunities to strengthen belonging.
☐	Identify adult behaviors that build trust.
☐	Identify adult behaviors that erode trust.
☐	Clarify how conflict, incivility, or professional boundary concerns are addressed.

Operations and Management

	Checklist Item
☐	Review arrival, dismissal, lunch, and hallway systems.
☐	Review duty schedules.
☐	Review emergency procedures.
☐	Review substitute procedures.
☐	Review purchasing and budget routines.
☐	Review facility needs.
☐	Review transportation procedures.
☐	Review event planning procedures.
☐	Review technology support procedures.
☐	Review communication procedures for families and staff.
☐	Identify operational systems that create unnecessary friction for staff or families.

Personnel and Staff Support

	Checklist Item
☐	Review staffing assignments.
☐	Review evaluation responsibilities.
☐	Review staff professional growth plans.
☐	Review staff attendance patterns.
☐	Review vacancies and hiring needs.
☐	Review employee performance concerns.
☐	Clarify documentation expectations.
☐	Clarify progressive discipline procedures.
☐	Clarify how the district supports principals with difficult conversations.
☐	Identify staff members who may need additional support, coaching, or clarity.

5. First 90 Days: Move from Understanding to Focused Action

Research connection: Effective leaders do not try to improve everything at once. Principal effectiveness depends on focus,

coherence, data-informed decision-making, and the ability to organize adults around a small number of high-leverage priorities (Leithwood et al., 2004; Wallace Foundation, 2013).

Priority Setting

	Checklist Item
☐	Identify three to five high-leverage priorities.
☐	Align priorities to district goals.
☐	Align priorities to the school improvement plan.
☐	Identify what will be protected.
☐	Identify what will be paused.
☐	Identify what will be adjusted.
☐	Identify what will be eliminated.
☐	Avoid launching too many initiatives at once.
☐	Clarify what staff can expect from the principal.
☐	Clarify what the principal expects from staff.
☐	Communicate priorities clearly and repeatedly.

School Improvement Planning

	Checklist Item
☐	Review current goals with the leadership team.
☐	Determine whether goals are clear, measurable, and aligned.
☐	Identify leading indicators.
☐	Identify lagging indicators.
☐	Create a progress-monitoring routine.
☐	Determine when data will be reviewed.
☐	Determine who owns each action step.
☐	Determine how progress will be communicated.
☐	Connect school improvement work to classroom practice.
☐	Ensure improvement planning does not become a compliance exercise.

Team Design and Meeting Coherence

	Checklist Item
☐	Clarify the purpose of the school leadership team.
☐	Clarify the purpose of department or grade-level teams.
☐	Clarify the purpose of student support teams.
☐	Clarify the purpose of PLCs.
☐	Reduce meeting overlap where possible.
☐	Ensure each team has a clear agenda, role, and outcome.
☐	Align team conversations to school priorities.
☐	Clarify what decisions are made by which team.
☐	Create a predictable meeting cadence.
☐	Ensure meetings produce action, not just discussion.

6. Principal Support from the District: Build the Conditions for Success

Research connection: Principal turnover is associated with lower student achievement gains, higher teacher turnover, and disruption to school improvement. Districts can improve principal retention by strengthening working conditions, decision-making authority, mentoring, professional learning, and supervisor support (Levin & Bradley, 2019).

Supervisor Support

	Checklist Item
☐	Schedule regular check-ins with the principal's supervisor.
☐	Clarify the purpose of supervisor check-ins.
☐	Use check-ins for coaching, not just compliance.
☐	Review progress toward first-year goals.
☐	Problem-solve barriers.
☐	Provide timely feedback.
☐	Clarify district expectations before problems escalate.
☐	Protect the principal from unnecessary distractions when possible.
☐	Help the principal prioritize when demands become overwhelming.
☐	Ensure the principal does not have to interpret district priorities alone.

Mentoring and Coaching

	Checklist Item
☐	Assign a trained mentor principal.
☐	Clarify the mentor's role.
☐	Clarify what should be discussed with the mentor versus the supervisor.
☐	Provide confidential leadership coaching when possible.
☐	Create opportunities for the principal to observe strong principals.
☐	Provide support for difficult conversations.
☐	Provide support for teacher evaluation and documentation.
☐	Provide support for instructional leadership.
☐	Provide support for budget and operations.
☐	Provide support for community and family engagement.
☐	Continue mentoring beyond the first few months.

Professional Learning

	Checklist Item
☐	Provide training on district systems.
☐	Provide training on teacher evaluation expectations.
☐	Provide training on special education responsibilities.
☐	Provide training on legal and policy requirements.
☐	Provide training on safety and crisis response.
☐	Provide training on communication and media response.
☐	Provide training on budget and resource allocation.
☐	Provide training on instructional leadership.
☐	Provide training on school improvement planning.
☐	Provide leadership development connected to the actual work of the principalship.

7. Year-One Leadership Moves: From Entry to Impact

Research connection: Effective principals influence schools through instructionally focused interactions with teachers, productive school climate, collaboration and professional learning communities, and strategic management of personnel and resources (Grissom et al., 2021).

Visibility and Presence

	Checklist Item
☐	Be visible in classrooms.
☐	Be visible during transitions.
☐	Be visible at arrival and dismissal.
☐	Attend student activities.
☐	Attend family and community events.
☐	Create informal opportunities to connect with staff.
☐	Be present in places where the school's culture is most visible.
☐	Use visibility to learn, reinforce expectations, and build trust.

Instructional Coherence

	Checklist Item
☐	Establish clear instructional look-fors.
☐	Ensure teachers understand learning expectations.
☐	Ensure teams use common data.
☐	Strengthen alignment between standards, instruction, tasks, and assessment.
☐	Provide feedback that improves practice.
☐	Support professional learning tied to school priorities.
☐	Use classroom visits to understand trends, not just individual teacher performance.
☐	Connect teacher collaboration to student learning evidence.

Culture Building

	Checklist Item
☐	Name the kind of school culture being built.
☐	Reinforce shared values.
☐	Celebrate early wins.
☐	Address adult behaviors that undermine trust.
☐	Protect dignity in difficult conversations.
☐	Build systems for recognition, repair, and accountability.
☐	Strengthen student belonging.
☐	Strengthen staff belonging.
☐	Communicate progress and next steps consistently.

Family and Community Engagement

	Checklist Item
☐	Establish predictable family communication.
☐	Create opportunities for parent voice.
☐	Meet with community partners.
☐	Communicate school priorities clearly.
☐	Share progress publicly.
☐	Invite families into the work without overwhelming staff.
☐	Use family feedback to identify barriers and opportunities.
☐	Make communication proactive rather than reactive.

8. Common Onboarding Mistakes to Avoid

Research connection: Onboarding fails when it is treated as information transfer instead of leadership development. New principals need context, coaching, clarity, and ongoing support (Mitgang, 2007; Darling-Hammond et al., 2007).

Avoid These Pitfalls

	Checklist Item
☐	Treating onboarding as orientation only.
☐	Overloading the principal with information but not support.
☐	Assuming an experienced principal understands the district's context.
☐	Waiting too long to clarify expectations.
☐	Providing data without helping the principal make meaning of it.
☐	Failing to identify cultural, political, or historical landmines.
☐	Allowing the principal to inherit broken systems without district support.
☐	Measuring success only by activity instead of impact.
☐	Letting urgent operational issues crowd out instructional leadership.
☐	Leaving the principal to figure out the role alone.
☐	Assigning a mentor without training, structure, or purpose.
☐	Providing feedback only when something goes wrong.
☐	Launching too many priorities during the first year.
☐	Treating principal retention as an individual resilience issue instead of a systems issue.

9. Evidence of Successful Principal Onboarding

Research connection: Successful onboarding should be visible in clarity, trust, instructional leadership, culture, systems, and retention. The measure is not whether a principal completed a checklist. The measure is whether the principal is more capable, connected, and positioned to lead improvement (Gates et al., 2019; Grissom et al., 2021).

Clarity

	Checklist Item
☐	The principal understands district priorities.
☐	The principal understands school strengths and needs.
☐	Staff understand the principal's leadership priorities.
☐	Staff understand the school's instructional expectations.
☐	The school improvement plan is focused and actionable.

Trust

	Checklist Item
☐	The principal has built productive relationships with staff.
☐	The principal has built productive relationships with students.
☐	The principal has built productive relationships with families.
☐	The principal has built productive relationships with district leaders.
☐	The principal has established predictable communication

	Checklist Item
	routines.

Instructional Leadership

	Checklist Item
☐	The principal is regularly present in classrooms.
☐	Teacher feedback is connected to instructional priorities.
☐	PLCs or collaborative teams are more focused.
☐	Data conversations are connected to action.
☐	Professional learning is aligned to school goals.

Culture and Systems

	Checklist Item
☐	Leadership team routines are clearer.
☐	Student support systems are more predictable.
☐	Operational systems are more consistent.
☐	Staff concerns are addressed more proactively.
☐	Families receive clearer and more consistent communication.

Retention and Sustainability

	Checklist Item
☐	The principal has a sustainable leadership rhythm.
☐	The principal receives regular coaching or mentoring.
☐	The principal has clear support from the supervisor.
☐	District leaders understand what barriers the principal is facing.
☐	The principal is more confident, capable, and supported than when the year began.

10. Reflection Questions for District Leaders

Use these questions throughout the onboarding process to keep support focused, practical, and responsive to the principal's actual context.

Ongoing Reflection Questions

	Checklist Item
☐	What does this principal need to know?
☐	Who does this principal need to know?
☐	What systems does this principal need to understand?
☐	What decisions does this principal need clarity on?
☐	What does this school need most from its principal right now?
☐	What does the principal need from the district to lead well?
☐	What should be addressed immediately?
☐	What should wait?
☐	What early wins are possible?
☐	What barriers can the district remove?
☐	What support will help this principal stay?

	Checklist Item
[]	What will make this principal more effective one year from now?

Closing Thought

The goal of principal onboarding is not simply to help a new leader survive the first year.

The goal is to help the principal lead with clarity, build trust quickly, align adult effort, improve teaching and learning, and create the conditions for lasting school improvement.

Great onboarding does not happen by accident. It is designed.

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