School Closure & Legacy Stewardship Framework

A mission-centered planning guide for school leaders

By Chad Tew

AT A GLANCE

About LearnCollab

LearnCollab helps schools and learning communities think clearly about collaboration, rightsizing, mergers, strategic restructuring, and mission-centered legacy stewardship. Its work is grounded in the belief that school leaders facing enrollment and financial pressure deserve practical tools, humane process design, and strategic options before crisis narrows the field of action.

This guide is designed to help leaders:

- Recognize when contingency planning should begin.
- Explore alternatives to closure while preserving mission-centered options.
- Create a confidential board work group before a crisis forces rushed decisions.
- Protect students, employees, records, donors, creditors, and institutional legacy.
- Move from fear and avoidance toward disciplined stewardship.

Use this framework as a planning map, not as legal advice. Schools should consult qualified legal, accounting, accreditation, employment, tax, real estate, insurance, and communications professionals before acting.

Framework Roadmap

1 Warning Signs	**2** Alternatives	**3** Governance	**4** Task Force
5 Communications	**6** People	**7** Assets & Records	**8** Legacy

BOARD CHAIR BRIEFING

The Case for a Plan C

When the end of a school's financial runway is in sight - perhaps 18 to 24 months in the future - responsible trustees should begin preparing for the unwanted possibility of closure, even while continuing to pursue rightsizing, merger, partnership, or other strategic alternatives.

A confidential closure contingency work group can begin addressing:

- Financial decision thresholds and a realistic closure budget.
- Legal, regulatory, accreditation, and employment obligations.
- Student placement, records access, and family transition support.
- Employee communication, retention, benefits, and outplacement.
- Creditor, contract, donor, endowment, and restricted-fund issues.
- Campus, technology, records, and asset disposition.
- Stakeholder communications and announcement sequencing.
- Preservation of the school's history, community, and mission legacy.

Closure may be the least desired outcome. But disciplined preparation can make the difference between a chaotic ending and a responsible, compassionate act of stewardship.

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Planning Elements

Reader·s Guide

Use this framework as a planning map, not a prediction. The goal is to preserve options, protect people, and steward mission if closure becomes one possible path.

FRAMEWORK

Purpose of This Framework

A school is more than an organization. It is a community, a set of relationships, a repository of memory, and a promise made to generations of students and families. When leaders must consider closure, their task is not only to wind down operations, but to steward the school's mission, people, assets, obligations, and legacy with care.

School closure is never the preferred outcome. But when enrollment, finances, governance capacity, or market conditions make continued operation unsustainable, leaders have one final responsibility: to act with clarity, compassion, legal discipline, and fidelity to mission.

This framework helps school trustees and senior administrators prepare for possible closure while continuing to explore restructuring, partnership, merger, asset sale, program transfer, or other mission-preserving strategies. A closure contingency plan does not mean the school has decided to close. It means leaders are preparing responsibly so that, if closure becomes necessary, the school can protect people, meet obligations, and preserve the best of what the school has meant to its community.

Publication Note

This document is made available as a public thought piece free of charge. It is not intended as, nor should it replace, licensed legal, accounting, and other professional advice.

Executive Overview

When a school faces unsustainably low enrollment and/or financial distress, leaders often delay difficult conversations because the word "closure" feels like failure. In reality, disciplined contingency planning is an act of stewardship. It allows trustees and administrators to protect options, reduce panic, and make decisions based on mission, facts, and process rather than fear.

A responsible school closure process should be guided by several core commitments:

- Protect students. Their educational continuity, records, emotional well-being, and placement in appropriate next schools must be the first priority.
- Support employees. Faculty and staff deserve timely communication, legal clarity, transition support, and respect for their years of service.
- Communicate truthfully and compassionately. The school should control the message, avoid rumor-driven disclosure, and speak with one clear voice.
- Preserve institutional legacy. A school's story, traditions, archives, alumni relationships, and public-service mission should be honored, not simply liquidated.
- Comply with legal, financial, donor, and regulatory obligations. Closure requires disciplined attention to contracts, records, employment law, restricted gifts, creditors, tax filings, and state nonprofit requirements.
- Maintain board discipline and process integrity. Trustees and administrators must follow clear decision-making authority, preserve confidentiality, and document the process carefully.

This framework helps leaders move from early warning signs to contingency planning, alternatives, board decisions, communication, student and employee transition, and legacy preservation.

FRAMEWORK SECTION

1. Guiding Principles

The best way to begin a difficult process is by invoking that which binds the community together: the mission and values the school has worked hard to uphold, and the positive difference leaders want remembered if the school ultimately ceases to operate.

a) Keep the focus on mission and values.

The trustees hold the mission in trust, not simply the bricks and mortar, the corporate structure, or the name on the sign. In some circumstances, the most mission-faithful act may be to preserve the school in its current form. In others, it may be to pursue merger, transfer programs, redeploy assets, or complete the school's life with dignity.

b) Document a thoughtful, multi-step decision process.

The board should be able to show that it considered relevant facts, reviewed alternatives, received appropriate professional advice, evaluated risks, and acted in the best interests of the school and its charitable mission.

c) Emphasize confidentiality of deliberations.

Sensitive discussions about finances, enrollment, possible closure, merger, asset sale, or staffing changes should remain confidential until the board authorizes disclosure. Get NDAs from any discussion participants not already covered by a confidentiality obligation.

d) Establish clear, strict process authority.

No trustee, administrator, employee, or outside advisor should discuss deliberations or take action without explicit approval, even when they believe they are acting in the school's best interest. Well-intended side conversations can damage negotiations, create legal exposure, undermine trust, and accelerate community panic.

e) Lead with compassion, not avoidance.

The closure of a school, or even the serious consideration of closure, will be deeply emotional for many students, parents, employees, alumni, donors, and community members. Leaders should not minimize the pain, but neither should they allow grief, shame, or wishful thinking to replace disciplined decision-making.

FRAMEWORK SECTION

2. When to Begin Closure Contingency Planning

> **Board Caution**
>
> Begin planning before closure is inevitable. Waiting too long can reduce options, increase legal risk, and make it harder to protect students, employees, creditors, and legacy.

Closure contingency planning should begin before closure is inevitable. Waiting too long can reduce options, increase legal risk, and make it harder to protect students, employees, creditors, and the school's legacy.

Warning signs may include:

- Persistent enrollment shortfalls.
- Multi-year operating deficits.
- Depleted reserves.
- Reliance on restricted funds, emergency gifts, or extraordinary borrowing to fund ordinary operations.
- Inability to meet payroll, debt, rent, vendor obligations, or financial aid commitments without extraordinary intervention.
- Accreditation, licensing, or compliance concerns.
- Excessive dependence on one donor, lender, lease, campus asset, or emergency transaction.
- Loss of key administrators, trustees, or financial staff.
- Failure to meet admissions, re-enrollment, or fundraising benchmarks by defined decision dates.
- No credible path to enrollment or financial recovery within a defined period.

Contingency planning is not the same as deciding to close. It is a disciplined way to prepare for one possible outcome while continuing to explore alternatives.

FRAMEWORK SECTION

3. Alternatives to Closure That Should Be Explored in Parallel

> **Leadership Frame**
>
> Exploring closure contingencies should not crowd out alternatives. The aim is to preserve options - not to make the most feared option feel inevitable.

Because closure is such a consequential decision, leaders should consider whether another mission-preserving path is viable. In many cases, the most responsible planning process will include one task force focused on closure contingency planning and another focused on alternatives.

Possible alternatives may include:

- Merger with another independent school.
- Program transfer to another nonprofit or educational organization.
- Sale, lease, or joint use of campus assets.
- Shared leadership or shared back-office operations.
- Strategic downsizing of grades, programs, staff, or facilities.
- Partnership with another school, church, synagogue, university, community organization, or educational provider.
- Conversion to a different school model.
- Temporary pause, if legally, financially, and operationally viable.
- Asset sale paired with a mission-preserving successor use.
- Teach-out or student-placement partnership with nearby schools.

These alternatives should be evaluated honestly. Leaders should avoid using unrealistic alternatives as a way to postpone action, but they should also avoid treating closure as inevitable before exploring credible paths that might protect the school's mission in another form.

FRAMEWORK SECTION

4. Board Governance and Decision Process

Governance Discipline

- Formal authorization
- Clear delegation of authority
- Conflict-of-interest review
- Careful minutes and document preservation
- Insurance and legal-risk review

Closure planning should be grounded in disciplined governance. Trustees should recognize that they are operating under emotional pressure, financial strain, community scrutiny, and possible legal exposure. Strong process is protective.

Recommended governance steps include:

a) Board authorization for contingency planning.

The board should formally authorize closure contingency planning and define the scope of the work. This authorization should make clear that planning does not constitute a final decision to close.

b) Clear delegation of authority.

The board should identify who has authority to gather information, engage advisors, speak with potential partners, communicate with stakeholders, negotiate with creditors, and prepare recommendations.

c) Conflict-of-interest review.

Trustees and senior administrators should disclose any conflicts related to real estate, creditors, employment, vendor relationships, potential successor organizations, donor restrictions, or possible personal benefit.

d) Careful minutes and documentation.

Board minutes should reflect a thoughtful process without unnecessarily exposing sensitive deliberations. The school should preserve key documents, reports, financial data, advisor memos, and board actions.

e) Insurance review.

Review Directors and Officers liability insurance, general liability insurance, employment practices coverage, property insurance, cyber insurance, and any tail coverage or extended reporting periods that may be needed.

f) Document preservation.

The school should consider whether a document preservation or litigation hold is appropriate, especially if there is likely to be employee, parent, creditor, donor, regulatory, or contractual dispute.

FRAMEWORK SECTION

5. Create a Task Force to Develop a School Closure Contingency Plan

Task Force Rule of Thumb

The task force does not decide whether to close. It prepares a clear, humane, legally disciplined path in case the board later determines closure is necessary.

A closure contingency task force should develop a detailed plan for steps, timing, communications, costs, legal obligations, and transition support if school closure is deemed necessary.

a) Purpose of the task force.

The task force's job is not to decide whether the school should close. That decision belongs to the board. The task force's job is to prepare a clear, humane, legally disciplined path in case closure becomes necessary.

b) Composition.

The task force may include selected trustees, the Head of School, the CFO or business officer, legal counsel, communications support, and other advisors as appropriate. Membership should be limited to those with a clear need to know.

c) Parallel alternatives task force.

Ideally, there will also be a parallel group exploring new business models, partnerships, mergers, program transfers, sale scenarios, or other mission-preserving options.

d) Public notice.

If a formal closure decision is approved by the board, it should be communicated to all stakeholders. However, forming a contingency task force provides a vehicle for detailed preparation while closure remains only one of several possibilities under consideration. While in a contingency planning phase, public notice is generally not necessary unless required by law, contract, accreditation, financing arrangements, or other obligations.

Consider engaging outside advisors for legal, accounting, communications, student and employee transition, real estate, and process management.

a) Legal and accounting advice.

The need for appropriate legal and accounting advice is often self-evident, as it would be when putting the affairs of a seriously ill person or complex organization in order. Closure can involve corporate dissolution, employment law, accreditation, restricted gifts, creditor negotiations, tax filings, real estate, donor restrictions, student records, and state nonprofit requirements.

b) Process management and communications.

Just as professional hospice care can reduce pain and help all involved through a difficult process, an outside process advisor and communication strategist can help a school community navigate closure or possible closure with greater care. This assistance may seem like an unnecessary expense at a time when funds are tight, but professional, objective advice can help the school avoid painful missteps, misinformation, unnecessary conflict, and potential litigation.

c) Emotional distance and experience.

Being a trustee or administrator forced to confront the possible closure of a school is stressful and emotional. Even smart, professional people in this situation are more prone to making mistakes or overlooking what might be obvious to a dispassionate, experienced outside advisor.

d) Coordination among advisors.

A process facilitator does not take the place of an attorney, accountant, or communications professional. However, working in coordination with professional advisors, a facilitator can do much of the organizing, scheduling, follow-up, documentation, and stakeholder-management work at a lower hourly rate and can help keep the school from paying higher-cost specialists to perform basic coordination.

FRAMEWORK SECTION

7. Major Elements of a School Closure Contingency Plan

A closure contingency plan should address all major operational, legal, financial, educational, emotional, and legacy issues. The following sections identify core elements that should be included.

CONTINGENCY PLAN ELEMENT

7.1 Communications

Communication Priority

After a closure decision, speed and sequencing matter. Parents, employees, and students should hear directly from the school before rumor networks define the story.

In the age of social media, a closure announcement must be carefully sequenced and comprehensive. Once the decision to close a school is made, complicated transitions begin immediately, but clear communication must begin first.

a) Prepare the core message before the vote.

The Head of School and Board Chair should be prepared immediately after the board's decision to announce to parents, employees, and the broader community that the decision to close has been made.

b) Communicate quickly to employees and parents.

Some advisors may suggest that the first group notified should be the school's faculty and staff. It is important, however, to recognize the likelihood of quick staff-to-parent networks of communication. Because it is better for parents to hear directly from the school rather than through leaked or partial information, intensive school-to-parent communication should begin at approximately the same time as faculty/staff meetings.

c) Communicate thoughtfully with students.

Announcing the decision to students must be done thoughtfully, age-appropriately, and in rapid succession following notification of employees and parents. For many students, employees, alumni, and families, the announcement will feel like the loss of a beloved community. Counseling and pastoral/emotional support should be available immediately. Include this cost in the closure budget.

d) Identify stakeholder groups.

In addition to employees and families, the comprehensive communications plan should include:

- Alumni.
- Donors.
- Government agencies.
- Accrediting bodies and professional associations.
- Local press.

- Unions or collective bargaining groups.
- Program partners and subcontractors.
- Suppliers and creditors.
- Area school and educational leaders.
- Local civic, religious, neighborhood, or community partners.
- Former trustees and former heads of school.

e) Develop communication materials.

The communications plan should include:

- Board-approved announcement language.
- Talking points for trustees and administrators.
- Employee FAQ.
- Parent FAQ.
- Student-facing language by age level.
- Alumni and donor message.
- Press release.
- Website notice.
- Social media plan.
- Internal instructions on who may speak for the school.
- Schedule of town halls, listening sessions, and transition meetings.

f) Communicate with honesty and care.

The school should avoid false reassurance, blame-shifting, or overly technical financial explanations that obscure the reality of the decision. The message should acknowledge grief, explain the decision clearly, describe immediate next steps, and emphasize the school's commitment to students, employees, and legacy.

CONTINGENCY PLAN ELEMENT

7.2 People: Students, Families, Employees, and Community

Taking care of the people who make up the school community should be the top priority. This focus is not only a way to stay true to the school's mission, but also the best way to minimize pain, confusion, and potential litigation.

a) Create transition plans for students and employees.

Create an outplacement and transition plan for both students and employees. These plans should not be implemented prior to a formal board vote to close the school, but they should be designed in advance so they can be activated immediately after a closure decision.

b) Provide clarity quickly.

Clarity on transition support for each group will help defuse anxiety. Families and employees will immediately ask, "What happens to me, my child, my job, my records, my tuition, my financial aid, my benefits, and my future?" The school should be prepared to answer as much as possible on the day of announcement and to provide a timetable for answers that require additional work.

CONTINGENCY PLAN ELEMENT

7.3 Student Continuity and Teach-Out Planning

Student-First Checklist

- Receiving-school list
- Expedited admissions pathways
- Records transfer
- Financial aid and tuition transition
- Learning support and accommodation records
- College counseling and credit guidance

Students and families need more than sympathy. They need a practical pathway to the next appropriate educational setting.

A student continuity plan may include:

- A list of receiving schools by grade level, program, geography, tuition level, and admissions capacity.
- Early conversations with likely receiving schools, subject to confidentiality and legal guidance.
- Expedited admissions pathways where possible.
- Flexibility regarding application deadlines, testing requirements, financial aid deadlines, and recommendation forms.
- Transfer of academic records.
- Support for students with learning differences, accommodations, health plans, or specialized services.
- College counseling support for upper school students.
- Guidance regarding athletic eligibility, arts programs, course placement, graduation requirements, and credits.
- Support for international students, including visa-related issues where applicable.
- Family meetings with potential receiving schools.
- A process for teacher recommendations and student narratives.

Many students will transfer to schools they considered when first applying to the closing school. The school should contact these potential receiving schools immediately after a closure vote, and where possible before public announcement through confidential exploratory conversations.

CONTINGENCY PLAN ELEMENT

7.4 Employee Transition

Employee Support Checklist

- Final payroll and benefits
- WARN/state notice review
- Outplacement support
- References and search connections
- Retention plan for key staff
- Counseling and emotional support

Faculty and staff members are not only employees; they are carriers of the school's mission and relationships. They deserve timely information, legal clarity, and practical support.

For employees, consider:

- Afterschool job search workshops.
- Résumé and LinkedIn support.
- Guidance for employees who have not searched for a position in the digital age.
- Connections to educational search firms.
- Presentations by search consultants or peer schools.
- Reference-letter support.
- A clear plan for final payroll, accrued vacation or PTO, retirement contributions, benefits, COBRA or benefit continuation, and unemployment support.
- Review of employment contracts, faculty agreements, handbooks, union agreements, severance policies, and benefit obligations.
- Retention bonuses or completion bonuses for key staff needed through the wind-down period, if financially possible.
- Mental health, counseling, pastoral, or employee assistance resources.

The school should also determine whether federal WARN, state WARN, or other employee notice laws apply. Legal counsel should advise on timing and required content of notices.

CONTINGENCY PLAN ELEMENT

7.5 Legal and Regulatory Requirements

Beyond press releases and community messages, the school should create a comprehensive list of entities that must receive formal notice of impending closure and a timetable to ensure the timing of notices meets legal, contractual, and regulatory requirements.

These may include:

- The state Secretary of State or equivalent corporate filing office.
- The state Department of Education or other school-oversight body.
- The state Attorney General or charity regulator, where applicable.
- The IRS.
- Payroll tax agencies.
- Accrediting bodies.
- Banks and creditors.

- Bondholders or lenders.
- Landlords, tenants, or real estate partners.
- Insurance carriers.
- Retirement plan providers.
- Employee benefit providers.
- Unions or collective bargaining groups.
- Required employee-notice recipients.
- Program partners, subcontractors, and vendors.
- Licensing or permitting agencies.

Counsel and accountants should confirm all federal and state dissolution filings, final Form 990 requirements, Schedule N requirements where applicable, charitable registration withdrawals, payroll tax filings, corporate filings, and any continuing obligations after the school ceases operations.

CONTINGENCY PLAN ELEMENT

7.6 Academic Records and Data Stewardship

> **Do Not Lose the Data Trail**
>
> A modern school closure is also a data-stewardship project: transcripts, health records, personnel files, donor data, cloud systems, domains, passwords, email archives, and privacy obligations.

Special arrangements must be made for academic record retention.

a) Student and alumni access.

Students and alumni should be notified how they can obtain their school records before the school closes, and they should be given clear information about the process and contact for obtaining records after the school has ceased operation.

b) Records custodian.

The school should identify a records custodian and budget for ongoing records access. Check state regulations and accreditation requirements for the period during which record access must be maintained.

c) File review and scanning.

Prior to closure, student files should be culled down to the legally required core elements and scanned, if possible, to reduce future storage and retrieval expense.

d) Broader data responsibilities.

A modern school closure requires more than preserving transcripts. The school should create a records and data plan covering:

- Student academic records.
- Health records.
- Learning support, accommodation, and special education records where applicable.
- Personnel files.

- Payroll and tax records.
- Board minutes and governance records.
- Donor records.
- Financial records.
- Contracts.
- Insurance records.
- Email archives.
- Cloud storage.
- Student information system exports.
- Learning management systems.
- Website and domain ownership.
- Social media accounts.
- Passwords and administrative access.
- Data destruction for records not retained.
- Privacy law review.
- Etc.

CONTINGENCY PLAN ELEMENT

7.7 Assets, Liabilities, Real Estate, and Contracts

Determining and distributing the school's final assets and debts are among the key issues facing most schools as they close.

a) Create a virtual deal room.

Gather documents on assets and liabilities in a virtual "deal room" so authorized trustees, administrators, and advisors can work from the same information.
This may include:

- Financial statements.
- Budgets and forecasts.
- Enrollment data.
- Tuition receivables.
- Debt documents.
- Loan agreements.
- Leases.
- Vendor contracts.
- Real estate documents.

- Insurance policies.
- Endowment and restricted fund records.
- Donor agreements.
- Pledge records.
- Employment contracts.
- Litigation or threatened claims.
- Equipment inventories.
- Intellectual property and technology assets.

b) Contact creditors and contract holders.

Once word of the school's closure is public, the process advisor or other dispassionate emissary should contact all creditors and contract holders and attempt to work out negotiated settlements to release liability.

Some large settlements may need to be contingent on the sale of assets and real estate. An escrow account may need to be opened to ensure that creditors are paid from asset sale proceeds.

c) Review real estate and physical assets.

If the school owns or leases real estate, the closure plan should address:

- Real estate appraisal.
- Mortgage, bond, lease, or deed restrictions.
- Zoning and land-use restrictions.
- Environmental review.
- Insurance through the wind-down period.
- Security of buildings after students leave.
- Maintenance, utilities, and property management.
- Sale, lease, transfer, or donation of campus assets.
- Inventory of furniture, technology, library materials, art, musical instruments, athletic equipment, vehicles, and specialized program equipment.
- Storage, sale, donation, or transfer of physical property.
- Preservation of archives, trophies, yearbooks, photographs, banners, plaques, and symbolic objects.

d) Distribute remaining assets in accordance with law and governing documents.

Net proceeds after creditors have been satisfied must generally be distributed to another nonprofit organization with a similar public-service educational mission or otherwise used for exempt purposes, subject to the school's governing documents and applicable law.

The school's bylaws, articles of incorporation, donor agreements, and state laws must be reviewed to identify specific requirements regarding remaining funds and assets.

CONTINGENCY PLAN ELEMENT

7.8 Donors, Endowment, Restricted Gifts, and Pledges

Donor relationships and restricted funds require careful legal and relational handling.

The school should:

- Inventory all restricted gifts, endowments, scholarship funds, board-designated funds, named funds, campaign commitments, and outstanding pledges.
- Review donor agreements, gift letters, campaign materials, naming agreements, and board designations.
- Determine whether funds are legally restricted or internally designated.
- Seek donor consent where possible before redirecting restricted funds.
- Consult nonprofit counsel regarding funds where donors are deceased, unavailable, or unwilling to consent.
- Determine whether court, Attorney General, or other regulatory approval is required to modify restrictions.
- Communicate with major donors before or shortly after public announcement, as appropriate and legally permissible.
- Attempt to accelerate payment of outstanding pledges where appropriate.
- Decide how to preserve donor recognition, named spaces, plaques, memorial funds, and scholarship legacies.

Donor communication should emphasize mission continuity, gratitude, transparency, and responsible stewardship of funds entrusted to the school.

FRAMEWORK SECTION

8. Closure Budget

There will be unique expenses related to researching options, preparing for closure, and winding down school operations. While there may be savings in areas such as recruiting a new class, provisions must be made and funded for items such as:

a) Records custody.

A records custodian, so former students and alumni can obtain copies of transcripts and school files. Check state regulations and accreditation expectations for the period during which record access must be maintained.

b) Professional advisors.

Professional advisors for specific tasks such as legal, accounting, communications, outplacement, real estate, employee benefits, insurance, donor restrictions, and grief counseling.

c) Process advisor/coordinator.

An overall process advisor or coordinator who can help streamline the work of other outside professionals, keep everything organized and on track during a complicated and emotional time, and provide continuity during a period in which the school may experience abrupt staff departures as employees accept new jobs.

d) Employee transition costs.

Potential costs may include severance, retention bonuses, accrued PTO, benefits continuation, retirement contributions, unemployment support, job search workshops, and search firm assistance.

e) Student transition costs.

Potential costs may include counseling, academic records preparation, transcript transfer, application support, family meetings, and special support for students requiring accommodations or complex placements.

f) Campus wind-down costs.

Potential costs may include security, utilities, insurance, maintenance, technology shutdown, data exports, moving, storage, auction, appraisal, environmental review, and property management.

g) Communications and community support.

Potential costs may include website updates, press support, town halls, printed materials, alumni communications, donor communications, and counseling support.

h) Celebration and legacy preservation.

Every school that has served students well deserves to have its story honored. Even in closure, leaders should create opportunities for gratitude, remembrance, and celebration. Budget resources for a modest celebration, alumni gathering, memory project, archive, or other legacy-preservation effort.

FRAMEWORK SECTION

9. Preserving the School's Legacy

Legacy Opportunity

A school's story should not disappear when operations end. Archives, rituals, alumni memory, and mission-directed assets can carry the best of the school forward.

A school closure is not only an operational and legal event. It is also a community ending. Strong leaders should help the community remember what the school made possible and carry forward the best of its mission.

Legacy preservation may include:

- A final celebration, homecoming, or community gathering.
- Division-level ceremonies for students.
- Faculty and staff recognition.
- Alumni oral histories.
- A digital archive.
- A final yearbook, memory book, or video.
- A permanent legacy webpage.
- Transfer of archives to a library, historical society, successor school, or association.
- Preservation of the school seal, motto, mascot, photographs, trophies, banners, plaques, and artifacts.
- A scholarship fund or grant program in the school's name.
- A final letter from the Board Chair and Head of School honoring the school's impact.
- Support for alumni networks after closure.

Legacy preservation is not window dressing. It helps students, employees, families, alumni, and donors understand that the school's life mattered, that its contributions are not erased, and that the mission may continue in other forms.

FRAMEWORK SECTION

10. Suggested Timeline

Each school's situation will be different, but a closure plan should usually include a timeline organized around several phases.

Phase 1: Early Warning and Confidential Planning

- Identify warning signs.
- Review financial and enrollment projections.
- Authorize contingency planning.
- Engage core advisors.
- Establish confidentiality expectations.
- Create task forces for closure planning and alternatives.
- Develop decision thresholds and dates.

Phase 2: Parallel Exploration of Alternatives

- Explore merger, partnership, program transfer, asset sale, restructuring, downsizing, or other options.
- Identify potential receiving schools for students.
- Prepare preliminary closure budget.
- Review legal and regulatory requirements.
- Begin records and data inventory.
- Prepare communication materials.

Phase 3: Board Decision

- Review facts, alternatives, financial forecasts, legal advice, and stakeholder impact.
- Address conflicts of interest.
- Approve closure, continued operation, merger, restructuring, or another path.
- Document the decision carefully.
- Authorize communications and implementation.

Phase 4: First 48 Hours After Closure Decision

- Notify employees and parents in coordinated sequence.
- Notify students in an age-appropriate manner.
- Activate counseling and emotional support.
- Release public statement and website notice.
- Contact receiving schools.
- Begin employee transition support.
- Notify key regulators, accrediting bodies, lenders, and partners as required.

Phase 5: First 30 Days

- Hold parent, employee, student, alumni, and donor meetings.
- Begin student placement work.
- Begin employee job transition support.
- Create records access instructions.
- Contact creditors and contract holders.
- Refine closure budget.
- Inventory assets and liabilities.
- Begin legacy preservation planning.

Phase 6: Final Semester or Final Year

- Support student completion and transfer.
- Maintain educational quality through the final operating period.
- Retain key personnel needed for continuity.
- Complete records transfer and storage.
- Wind down contracts and obligations.
- Prepare final events and celebrations.
- Manage campus, technology, and data shutdown.

Phase 7: Post-Closure

- Maintain records access.
- Complete final payroll, tax, legal, and corporate filings.
- Resolve remaining creditor issues.
- Sell, transfer, or distribute remaining assets.
- Preserve archives and legacy materials.
- Maintain post-closure contact information.
- Support alumni and former families as appropriate.

FRAMEWORK SECTION

11. Closing Thought

Preparing for school closure is painful, but avoiding preparation can make the pain far worse. A school that has served students and families deserves more than a rushed ending, fragmented communication, unpaid obligations, inaccessible records, and preventable conflict.

The goal of this framework is not to make closure easy. It is to help leaders act with courage, order, compassion, and mission-centered discipline. If closure becomes necessary, the final act of leadership is to protect the people, honor the past, preserve the legacy, and carry the mission forward in whatever form remains possible.

CLOSING RESOURCE

For More Detail

Use this publication as a starting point for board education, confidential contingency planning, and mission-centered conversation. It should be paired with school-specific legal, financial, employment, accreditation, tax, donor, real estate, insurance, and communications guidance.

LearnCollab

LearnCollab supports schools and learning communities facing strategic inflection points - including collaboration, rightsizing, mergers, restructuring, and legacy stewardship. Visit www.learncollab.org for related tools and resources.

ABOUT THE AUTHOR

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Chad Tew is founder and Chief Disruption Navigator at LearnCollab®, where for more than a decade he has helped independent schools develop sustainable financial and enrollment strategies, including rightsizing, strategic collaboration, and mergers.

He has founded a school, served as a CFO, trustee, and teacher, and worked as a university senior fellow. Chad brings a practical operator's perspective to hard questions facing independent schools: how to preserve mission when enrollment demand, financial structure, or institutional scale no longer support the old model.

He recently refreshed his personal "why" during a multi-month sabbatical, traveling widely and teaching English to monks while living in a Kathmandu Buddhist monastery. While writing a forthcoming book, Chad is building LearnCollab's platform to deliver merger and collaboration guidance at scale.

"The work is to help schools move from anxiety and delay toward disciplined options, clear process, and mission-centered decisions."

About LearnCollab®

LearnCollab® helps schools and learning communities think clearly about strategic collaboration, rightsizing, mergers, and other mission-preserving options. Its work is grounded in the belief that boards and school leaders need practical tools before a crisis narrows their choices.