

Evaluating the Head of School

Principles of Good Practice

- **The head of school is the board's employee (and its only employee); it is the board's responsibility to evaluate the head, not any one else's.**

The board may solicit input from teachers and staff (never directly from parents) using a 360-degree survey instrument, and from parents via periodic constituent satisfaction surveys, but gathering these data is only a portion of the evaluation, and they must always be interpreted against the backdrop of what else is happening in the school. For example, a decline in employee satisfaction scores on a periodic constituent survey is to be expected in years where, say, the school benefit plan is modified or salaries are frozen, and this finding may have very little to do with the head's performance that year.

Ideal Practice: *The board conducts an evaluation of the head's performance every year.*

- **The entire board, and not just the officers or executive committee, should have input into the evaluation.**

Since evaluating the head is an essential function of school governance, every board member should have input into the evaluation. Input may be sought using the same 360-degree survey used with teachers and staff, or by a candid and open discussion during executive session at a board meeting.

Ideal Practice: *Every board member participates in the evaluation using whatever medium is established for that purpose.*

- **The evaluation process should occur on an annual basis, beginning in the summer and culminating in the spring.**

The evaluation process begins before the school year starts and ends well after Spring Break. While some of the evaluation criteria may change from iteration to iteration, the basic cycle of events remains a fixed aspect of board operations.

Ideal Practice: *The process recursively follows a cyclic pattern of the sort described in the next section (see below).*

- **The board selects a small group of its members as the head evaluation committee (HEC) to assemble, distill, and discuss the evaluation results.**

Feedback to the head should happen in a conversation between the head and a small number of trustees, not the head sitting in front of the entire board listening to each member's critique. The intimacy of a smaller group is useful in fomenting the actions that evaluations are intended to produce; e.g.,



mutual understanding, planning for professional development, behavior change, and calibration or recalibration of the head's goals.

Ideal Practice: *A HEC consisting of the board president, the chair of the governance committee, and a trustee of the head's own choosing oversees the evaluation process and delivers the culminating feedback.*

- **The evaluation should be informed by multiple streams of data, interpreted against the background of ongoing events.**

No one stream of data is sufficient to gauge the performance of the CEO of a complex organization such as an independent or international school.

Ideal Practice: *The HEC compiles data for the evaluation from the following sources to set the criteria.*

- Factors described in the head's job description.
 - Factors related to the school's success (e.g., "dashboard indicators" of admissions, retention, giving, customer and employee satisfaction, outcomes for students, etc.).
 - Factors linked to the strategic plan of the school, the mission, and/or specific goals set for the year.
 - Factors associated with effective school leadership (e.g., competencies probed by a standardized 360-degree instrument administered to board members, administrators, teachers and staff).
- **The results of the evaluation and recommendations of the HEC are shared with the school head by the board president and/or the committee in private, and then with the entire board in executive session.**

Ideal Practice: *The HEC or board president meets with the head to review the committee's integration of the data, presenting both positives and negatives in a constructive way. Then, the committee shares its findings with the full board in an executive session. The HEC shares a top-level analysis of the objective and subjective data, including specific metrics only as necessary to clarify understanding of the relevant point. Written survey comments are not shared; rather, the HEC prepares a summary of what was learned.*

- **Objective goals (a small, manageable number of them) for the coming year should be set for the head.**

To underscore the forward-looking nature of the evaluation, the process ends with creation of a new set of goals for the head based on the above performance



feedback. Because busy CEO's are unlikely to address an extensive list of goals, priority should be given to those most relevant to the head's success as a leader for the school at this point in time.

Ideal Process: *After sharing the evaluation summary with the full board, the HEC and head draft a new set of 5 or 6 goals for the coming year.*



Model Process Calendar

Month	Event	People
July or August	A HEC is appointed and has its initial meeting with the head to review process, calendar and content for the evaluation.	HEC members and the head of school.
February or Early March	Launch 360-degree survey and compile the other evaluative data.	HEC members
April	HEC reviews all of the data line by line, and integrates the findings into a clear and concise summary for the head and board.	HEC members
Late April or May	The HEC meets with the head to share a summary of its findings, and then presents the same to the full board in executive session.	HEC members, the head of school, and the full board
June	In a meeting subsequent to feedback delivery, the HEC and head mutually agree on a new set of 5 or 6 goals for the next school year. The HEC shares these with the full board as part of its year-end report.	HEC members and the head of school

