Evaluation of the Head of School
An ISACS Monograph

Evaluating the head of school is a major responsibility of the board of trustees and is a requirement for ISACS accreditation. Evaluation should be conducted annually, typically at the end of the school year, in May or June.

Evaluation should include input from the entire board and be based on three considerations:

- The head's job description (a sample is included in the ISACS monographs);
- The head's professional and personal skills (sample below); and
- The head's goals for the year, developed jointly by the head and the board and approved by the board at the beginning of the year.

The instrument

An efficient way to accomplish the evaluation is to use an instrument such as Survey Monkey to poll each board member using a scale from one to five plus "not applicable/no knowledge (NA/NK)" with space to comment on each item. An open-ended question or two at the end, such as "What were the head's greatest strengths/accomplishments this year? What needs improvement? Where should the head concentrate his/her efforts next year?" is recommended. Here is a sample instrument:

Rate the head's performance in the following areas (5=highest rating, 1-lowest):

Job Description   5   4   3   2   1   NA/NK

Board Relations
Curriculum and Instruction
Student Life
Business, Finance, and Plant Operations
Admissions, Marketing and Financial Aid
Advancement and Fund Raising

Professional Skills and Relationships   5   4   3   2   1   NA/NK

Knowledge and Skills as an Educator
Business and Financial Skills
Administrative and Organizational Skills
Fund-Raising Skills
Communication Skills – Interpersonal
Communication Skills – Writing
Communication Skills – Public Speaking
Constituent Relations – Board of Trustees
Constituent Relations – Students
Constituent Relations – Parents
Constituent Relations – Faculty

Goals for the Year   5   4   3   2   1   NA/NK

Goal 1
Goal 2
Goal 3
Goal 4
Goal 5 (if set)

What were the head's greatest strengths and accomplishments in the past year?

What areas would you suggest for improvement?

The numerical ratings from the evaluation instrument can be averaged to provide hard data that becomes valuable for comparisons between items and year to year for each item. The open-ended items should be scrutinized for general thoughts where there is some consensus. Individual responses that do not reflect

consensus should be ignored, unless the group thinks they are particularly helpful. A written document should be prepared and should include the numerical averages on each item as well as some general overall comments.

Roles and responsibilities

The board chair, usually with the help of the executive committee, trusteeship committee, or a special committee set up for the purpose, initiates the survey and collates the results. ISACS recommends that the officers of the board do this, especially if the board understands that this aspect of the head evaluation is part of the duties of their officers when they are nominated and elected.

In the spirit of sharing leadership and offering the head a broad base of feedback and counsel, the board chair should not conduct this process alone. On the other hand, given the importance of the board chair-head partnership and the fact that the chair may be privy to a level of operational detail beyond that of the full executive committee, a head's evaluation committee that excludes the board chair seems ill-advised.

The board chair, sometimes accompanied by the vice chair and/or past chair, should meet with the head to go over and discuss the results and plans for the future. A summary of this process, along with the collated results, should be presented to the full board.

While seeking feedback from all constituents, as in a 360-degree evaluation, can be very useful for the head of school, we recommend this only as a head-initiated process for professional growth and not as a tool for meeting the board's responsibility to evaluate the head.

Recommended reading

General resources from NAIS:

DeKuyper, M.H. (ed.). *The NAIS trustee handbook*, 9th edition. National Association of Independent Schools (NAIS), 2007, pp. 130-131.
http://www.nais.org/Bookstore/Pages/ProductDetail.aspx?productid=%7b4CCD9104-BC67-E111-9A8C-00505683000D%7d

"Evaluating the head of school." NAIS, April 20, 2008.
http://www.nais.org/Articles/Pages/Evaluating-the-Head-of-School.aspx

"Governance answer files: Board participation in head of school evaluation." NAIS, Sept. 28, 2012.
http://www.nais.org/Articles/Pages/Board-Participation-in-Head-of-School-Evaluation.aspx

Relevant to 360-degree feedback processes:

"Is 360 feedback useful in private-independent schools?" Ideas & Perspectives online, Vol. 51, No. 13. Independent School Management (ISM).
www.isacs.org/uploads/file/ISM%20on%20360%20Feedback.pdf

Littleford, J. "Comparables and the importance of evaluation." In "Executive compensation: The process, pitfalls, and opportunities."
http://jlittleford.com/wp/executive-compensation-the-process-pitfalls-and-opportunities/

Robinson, S. "The head evaluation: Assessing constructs." President's Blog, Southern Association of Independent Schools (SAIS), February 13, 2013.
http://drsteverobinson.wordpress.com/tag/evaluation/

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