

HEAD OF SCHOOL EVALUATION TOOLKIT



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EducationBoardPartners

INTRO

One of the most important responsibilities of the board of a public charter school board is to evaluate the Head of School. For the purposes of this tool, we define the Head of School as the individual who reports directly to the Board of Directors (e.g., Chief Executive Officer, Executive Director, Head of School).¹

This evaluation is the board's most powerful opportunity to exercise effective oversight and hold the school accountable for academic, financial, and operational success. The Head of School is responsible for managing the school, setting ambitious goals, and meeting those goals. The board, in turn, is responsible for making sure the leader is doing so, offering them feedback to help them improve, providing professional support and development as needed, and recognizing excellent performance.

This is not easy. Boards often struggle to conduct a professional, thorough, comprehensive evaluation that provides a clear and accurate picture of how well the leader is performing in their job. This toolkit is designed to help.

The relationship between the board and the Head of School is the backbone of a good school and an effective board. The annual evaluation process should be the foundation of that relationship. Evaluation should be embraced as a positive, productive process, and the Head of School should be encouraged, and required, to ensure that the board has accurate and full information throughout the year about the school's performance. The evaluation process allows the board to engage formally with the Head of School about their strengths, challenges, and development opportunities in ways that ensure the school has the leadership it needs to drive student success.

An effective Head of School evaluation process allows the board to:

- Develop clear performance measures and goals every year so the Head of School's work is aligned with and supports the school's strategic direction
- Assess the Head of School's ability to perform the core competencies of the position and to meet agreed-upon annual goals
- Identify proactively when the leader is not on track to meet their goals, and provide support, professional development, and timely feedback to help them improve
- Recognize and reward successes, which helps retain strong leaders
- Provide an opportunity for the Head of School to reflect on their performance
- Create a transparent structure for communicating with the Head of School about their performance regularly and routinely throughout the year
- Ensure that the board brings an equity lens to its oversight role by monitoring the Head of School's leadership with regard to equity and diversity among the school staff; equitable policies and processes; a clear focus on differences in student outcomes between students of different races, socio-economic backgrounds, genders, and special education needs; and the existence of an equity-focused school culture

¹ This toolkit is meant for boards to use in evaluating the executive leader of the school/organization. It is not meant for school leaders to use in evaluating their direct reports (e.g., principals, instructional leaders, chief academic, finance, or operational officers, etc.)

This toolkit offers:

- A clear and streamlined process for boards to use in evaluating the Head of School's performance
- A list of data sources boards should tap to ensure they have full information about Head of School performance
- Templates for the board's evaluation and the leader's self evaluation
- Guidance around gathering input from parents, staff, and stakeholders
- FAQs
- Links to helpful resources/organizations

The toolkit is divided into three sections:

1. **The Evaluation Process**
2. **Head of School Evaluation Tools and Resources**
3. **Frequently Asked Questions**

For more information about our work, and for an editable version of this toolkit, please visit www.edfuel.org and www.edboards.org.



THE PERFORMANCE EVALUATION PROCESS

The evaluation process includes six main steps:

1. Goal Setting
2. Regular Monitoring and Feedback
3. Data Gathering and Review
4. Head of School Self Evaluation
5. Board Review Discussion
6. Performance Evaluation Delivery

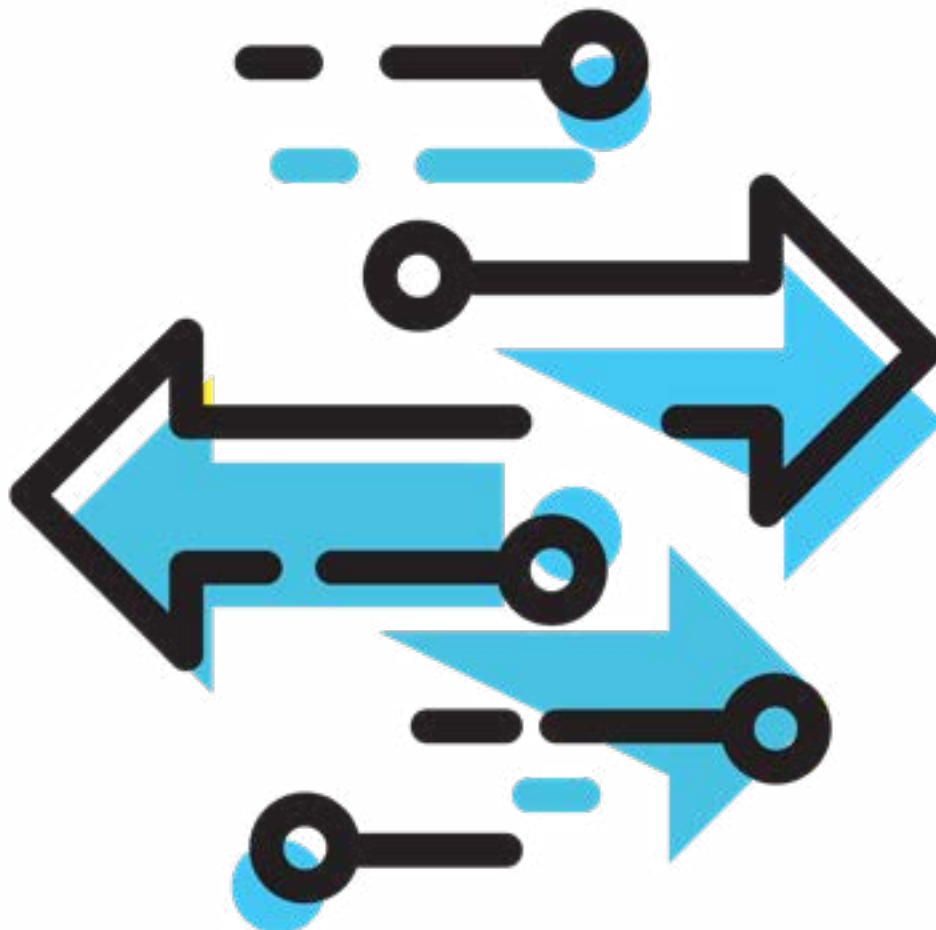
Each of these steps is explained in further detail below.

STEP 1: GOAL SETTING

- The board and the Head of School ensure they are clear about what the Head of School will be evaluated on, what excellence looks like, and what data the board will use to evaluate performance, including both qualitative and quantitative data.
 - The entails reviewing the Head of School's job description and updating it each year to reflect any changes (e.g., moving to multiple campuses, launching new initiatives, etc.)
- The Head of School drafts three to five goals focused on improving academic outcomes and ensuring financial and operational health of the school. These should include professional development goals, and they should be aligned with the long-term strategy for the school. For examples of goals, please refer to the **Sample Goals** section below.
 - The board chair and the Head of School agree to the goals and share with the full board, for discussion and revision. The full board approves the goals.
- In addition to the goals, the Head of School and board should agree to a set of competencies that are required to accomplish the goals. These competencies should reflect the most important skills needed to achieve the goals.
 - The board should decide whether the full set of competencies required for the Head of School position will be included in the evaluation, or if the board will select a subset of competencies with the Head of School each year. For more information on how to make that decision, and for competency resources, please see the **Competency Resources** section below.
- The board and Head of School agree upon a tool to use to evaluate the Head of School, which should include assessment of meeting both goals and competencies
- The board selects one member to lead the Head of School evaluation process. This designated board member should not be the board chair, to ensure that more than one board member is involved in performance evaluation, monitoring progress, and providing feedback to the Head of School; this protects both the board and the Head of School from overreliance on the board chair, is a more inclusive approach to governance, increases board engagement, and limits the influence of one board member in performance evaluation.

STEP 2: REGULAR MONITORING AND FEEDBACK

- Throughout the year, the board holds itself accountable for always having an eye on what information will help inform their evaluation, what data is already being collected that the board can access (such as teacher and parent surveys), the timeline for information (such as when student test scores are released, and how difficult it is to administer surveys in the summer), and how the board can gain important insights throughout the year.
 - The designated board member should keep notes about Head of School performance as the school year unfolds, not just at the end of the year. This approach will help ensure that the board has a full and fair picture of the Head of School's performance.
- At regular, planned intervals throughout the year, the board provides concrete, direct feedback to the Head of School on their performance, progress towards goals, and management of ongoing school operations.
 - The board chair meets regularly and routinely with the Head of School to deliver this feedback, organized around progress towards goals
 - The board chair shares information with the full board at least quarterly to keep the board informed about ongoing performance
 - The Head of School presents a formal midyear report to the board on progress to goals and any other issues related to performance management and professional development



STEP 3: DATA GATHERING AND REVIEW

- The designated board member reviews relevant and accurate information related to Head of School performance, including:
 - Data that provides a complete picture of the overall academic performance of the organization, as measured by indicators of student academic performance, school culture, discipline, enrollment, graduation, social/emotional learning, etc.
 - Data that provides a clear picture of the overall financial performance of the organization, as measured by monthly financial statements, balance sheet, and the annual audit.
 - Data that provides comprehensive insight into the overall operational health of the organization, as measured by indicators such as the existence and quality of policies and procedures, staff retention/attrition data, etc.
 - Staff and direct report input
 - Parent and stakeholder input
 - Board member input
 - The Head of School's self evaluation
- The designated board member works with others on the board to be sure that the board is gathering and reviewing this information with an equity lens. Depending on the goals set by the board and the Head of School, some potential questions that assess for equity may include:
 - Do families of color re-enroll at different rates than white families?
 - Are white teachers promoted more often, paid more, or disciplined less than teachers of color?
 - Are there gaps in academic performance, discipline incidents, referral to special education or gifted programs etc., between students of different races, genders, socio-economic background, etc?
 - Does the Head of School display evidence of bias (conscious or subconscious) in their self-evaluation?
- The designated board member drafts a performance evaluation based on a detailed review of this data and sends it to the full Board of Directors, attaching key data (this toolkit provides a template for the report).

STEP 4: HEAD OF SCHOOL SELF-EVALUATION

- The board shares the self-evaluation tool with the Head of School and provides an overall timeline for the evaluation process (and then sticks to that timeline). The Head of School completes the same evaluation questions as the board will complete.
- The Head of School completes the self-evaluation and sends it to the designated board member.

STEP 5: BOARD REVIEW DISCUSSION

- The designated board member sends the draft performance evaluation and the Head of School's self-evaluation to the full board, confidentially, at least 72 hours in advance of the meeting at which it will be discussed.
- During an executive session at a full board meeting, board members discuss the evaluation and share feedback with the designated board member on the evaluation.
- The designated board member incorporates any changes based on the feedback from the full board and sends the evaluation to the Head of School.

STEP 6: PERFORMANCE EVALUATION DELIVERY

- The Head of School, the board chair, and the designated board member meet to review each section of the evaluation, highlighting key points, discussing questions, and summarizing conclusions.
 - It is important to have an eye to who is in the room; for example, if the board chair and the designated board member are both white and the Head of School is a person of color, the board might consider adding another board member to this meeting, talking with the Head of School about whether she feels comfortable with the situation, and using this as an opportunity to discuss board diversity and inclusiveness.
 - It is essential that this discussion including both positive and constructive negative feedback, so the Head of School is both recognized for strong performance and given the opportunity for feedback on areas for growth and improvement.
- The Head of School, the board chair, and the designated board member draft next steps:
 - If necessary, agree on a performance improvement plan and assess progress against this plan in the coming weeks and months.
 - Set 3-5 goals to guide the Head of School's work for the next year.
- The evaluation is sent to the full Board of Directors and placed in the leader's personnel file.



CYCLE OF HEAD OF SCHOOL EVALUATION



HEAD OF SCHOOL EVALUATION TOOLS AND RESOURCES

This section includes a set of sample tools and resources for use in Head of School evaluations:

1. [Sample Timeline](#)
2. [Sample Goals](#)
3. [Evaluation Tools and Templates](#)
4. [Competency Resources](#)
5. [Sample 360 Survey Questions & Resources](#)
6. [Sample Professional Development Plans](#)

1 SAMPLE TIMELINE

The sample timeline below follows an academic year, but could be modified to follow a calendar year if preferable. The main point here is that evaluating the Head of School is an ongoing process that is part of the board's work all year long. The board should always have an eye on what information will help inform their evaluation, what data is already being collected that the board can access (such as teacher and parent surveys), the timeline for information (such as when student test scores are released, and how difficult it is to administer surveys in the summer), and how the board can gain important insights throughout the year. The designated board member should keep notes about Head of School performance as the school year unfolds, not just at the end of the year. This approach will help ensure that the board has a full and fair picture of the Head of School's performance.

APRIL-JUNE: GOAL SETTING

- Select designated board member
- Finalize evaluation instrument.
- Set goals
- Board approves goals

JULY-MAY: REGULAR MONITORING AND FEEDBACK

- Regular check-ins between board chair and Head of School
- Quarterly reports to board on progress towards goals
- Formal midyear report

MAY-JUNE: DATA GATHERING AND REVIEW

- Designated board member oversees gathering of information from board members, parents, staff/faculty, stakeholders, etc.
- Designated board member drafts evaluation report and shares it with full board at least 1 week prior to board meeting
- *Note that this is the most time-intensive part of the evaluation process, and the designated board member, and all board members, should plan ahead to invest the necessary time over these 4-6 weeks*

JUNE: HEAD OF SCHOOL SELF-EVALUATION

- Head of School completes self-evaluation
- Self-evaluation shared with full board

JUNE: BOARD REVIEW DISCUSSION

- Board holds formal evaluation discussion in executive session

JUNE-AUGUST: PERFORMANCE EVALUATION DELIVERY

- Board formally delivers evaluation to Head of School

2 SAMPLE GOALS

The following are example goals to provide a more concrete understanding of what the goals set by the board and Head of School should include. They are not meant to be comprehensive or a template for ideal goals.

STUDENT PERFORMANCE AND ACADEMIC GOALS

- Based on the results of an internally developed assessment administered by October 31, at least 85% of students will show a 15% improvement in their test scores.
- Reduce the gap in standardized test scores between white students and students of color by at least 5%.
- By EOY 2019-2020: Student Growth/performance -Standardized Test Goal (80% proficient) -PreK-2 (80% would show sufficient growth on school benchmark)
 - By EOY, 80% of SpED and ELL subgroups meet growth targets on standardized tests.
 - Reduce student performance gap of economically disadvantaged students by X%.
- By the end of the school year, 90% of seniors will graduate and 100% of graduates will be accepted into college
- By April 15, XYZ Public Charter School will complete the English Language Arts and math curriculum for the fifth grade that will open in the fall.

FINANCIAL GOALS

- By June 30, increase individual giving revenue by 20% over the fiscal year and the number of individual donors by 10%.
- By May 15, 2015, XYZ Public Charter School will be operating with a balanced budget for FY '20 including three months of operating cash on hand (\$500k) and \$2m in cash reserves to fund future capital expenditures.

OPERATIONAL GOALS

- By January 5, ensure that the renovation of the middle school science lab is completed and that the temporary classrooms are dismantled, all while ensuring that the cost of the project remains within the board-approved budget.
- By March 31, present to the board the project plan for completing the renewal application, specifically highlighting the role of the Board in renewal.
- By September 1, 2019, meet or exceed annual enrollment projection (800 in SY19-20)

SCHOOL CULTURE GOALS

- By mid year, parents are actively engaged and satisfied with school, as evidenced by 70% participation in school wide events, and 80% participation on parent survey with 60% satisfaction rates.
- By June 30, school culture will rank among the top Tier Schools (25%) when measured using the Insight Survey Metric System.

PERSONNEL GOALS

- By December 2019, create and implement a new teacher recruitment and retention plan, including a new compensation model, to ensure retention of 80% of teachers rated effective or highly effective by their principal.
- By August 2020, complete individual principal evaluation processes that include formal and informal evaluations that hold principals accountable for achieving pre-determined goals and identify opportunities for ongoing support and professional development.
- By June 2020, reduce the preventable staff attrition rate by 10%.
 - *Note: preventable attrition includes any reasons that are within the school's control. Unpreventable attrition includes such actions as moving to another state for family reasons, etc.*
 - *“Desired” attrition (e.g. staff members who are not performing) should also be counted as unpreventable, although the board needs to assess the extent to which the school has a set of criteria for performance that ensures a lack of bias in who is considered high-performing. We recommend in absence of this criteria, the board should consider unpreventable reasons such as the ones listed above due to potential equity issues.*
- By June 2020, ensure the preventable staff attrition rates are consistent (within 5%) across subgroups by race and gender.

3 EVALUATION TOOLS AND TEMPLATES

An effective Head of School evaluation should cover three areas:

1. Goals (what you got done)

What was your progress in reaching key goals for the year?

2. Competencies (how you got it done)

How are you demonstrating the skills essential to the position?

3. Overall Performance Assessment (overall, how well you did and next steps)

How did you do overall? What does the path forward look like?

In addition, we recommend adding a fourth aspect:

4. Feedback to the Board

This section solicits input on how well the board worked with the Head of School.

RATINGS

The following scale is used for all ratings in the review:

Exceeds expectations – consistently delivers exceptional results, is a model for others to follow, rare.

Meets expectations – consistently meets expectations in all areas.

Partially meets expectations – meets expectations in some areas, but needs improvement in others.

Does not meet expectations – needs significant improvement quickly.

EXAMPLE OF RATINGS

Example 1: One of the goals set by the board and the Head of School at the beginning of the year was to reduce preventable staff attrition by 10%. In the prior year, the preventable staff attrition rate was 25%. At the end of the current year, the preventable staff attrition was 20%. The rating for this goal would be Partially Meets Expectations as the rate was reduced, but not to the full extent of the goal.

Example 2: One of the goals set by the board and the Head of School at the beginning of the year was to reduce the gap in standardized test scores between white students and students of color by at least 5%. The board and the Head of School agreed that if the gap was reduced by 10% or higher, it would be considered exceeding the expectation. At the end of the current year, the gap between white students and students of color was reduced by 12%. The rating for this goal would be Exceeds Expectations, as the gap was reduced by more than 10%.

DIRECTIONS FOR USING THE SAMPLE HEAD OF SCHOOL EVALUATION INSTRUMENT

- **The same template should be used for the self-evaluation and the board evaluation:** The Head of School and the board should use the same instrument for the self evaluation and the board evaluation. This allows for consistency in questions answered.
- **The designated board member bears the responsibility of filling in the agreed-upon goals and competencies:** The board should fill in the agreed-upon goals and competencies in the evaluation template before sending to the Head of School to complete the self-evaluation.
- **The designated board member needs the self-evaluation in advance:** The board and the Head of School should agree to a timeframe by which the Head of School will send the self evaluation to the board representative. Typically, the self evaluation is sent to the board representative at least a few weeks in advance of the evaluation conversation to allow for time for the designated board member to complete the board evaluation and send it to the full board for feedback.
- **The self-evaluation should be utilized in the board evaluation:** The designated board member should carefully review and refer to the Head of School's self evaluation when filling out the board evaluation, and incorporate specific reflections from the Head of School into the evaluation.
- **The Head of School needs time to review the evaluation report in advance:** The designated board member should send the evaluation to the Head of School at least 48 hours in advance of the evaluation conversation (if not more) to allow time for the Head of School to review the evaluation.
- **Concise language is critical:** Reflections do not need to be lengthy, as it can reduce the extent of internalization of key information. Instead, the designated board member and the Head of School should focus on the most relevant information. Using bullet points is fully acceptable as the goal is to be concise and clear.

SAMPLE HEAD OF SCHOOL EVALUATION INSTRUMENT

Head of School Name		
Board of Directors (list members)		
Review Period		
Date of Review		
Reviewed by	Self <input type="checkbox"/> Board of Directors <input type="checkbox"/>	
SECTION I. ACHIEVING GOALS		
<i>Directions: Identify your overall goals and corresponding results.</i>		
Goals	Result(s)	Rating E: exceeds expectations M: meets expectations P: partially meets expectations D: Does not meet expectations
Comments: To what extent did you/the Head of School achieve the goals for the position this past period? To what extent did you/the Head of School do everything possible to reach the goals?		

SECTION II. DEMONSTRATING COMPETENCIES

Directions: Reflect on your demonstration of the organizational core values and the competencies required in your role. For sample competencies, see EdFuel's [Blueprint for Success competency maps](#).

Core Competencies and Descriptions	To what degree did you/this person demonstrate proficiency in the core competencies?
<INSERT COMPETENCY>	
<INSERT COMPETENCY>	
<INSERT COMPETENCY>	
<INSERT COMPETENCY>	

SECTION III. SUMMARY ASSESSMENT, NEXT STEPS, AND PROFESSIONAL DEVELOPMENT

Directions: Please complete the prompts below.

Overall performance rating:

- Exceeds Expectations Meets Expectations
 Partially Meets Expectations Does Not Meet Expectations

Qualitative Comments:

How are you/the Head of School performing overall?

What are the 1-3 most notable areas of strength?

What are the 1-3 areas for growth or improvement?

What are the next steps for growth or improvement in terms of your/the Head of School's professional development?

What do you see as your/the Head of School's future in the organization? Where do you see yourself/the Head of School in the next 3-5 years (inside or outside of the organization)?

SECTION IV. BOARD OF DIRECTORS FEEDBACK

Directions: Head of Schools: please share feedback for the Board of Directors on their work with you this year.

What is the Board of Directors doing well in their support of your work?

How could the Board of Directors support your work more effectively?

To what extent has the Board of Directors tailored their management approach to your leadership philosophy and background? How could the Board of Directors improve in this area to better personalize their approach to developing you as a leader?

4 COMPETENCY RESOURCES

One resource that boards can look to when working with the Head of School to select a set of relevant competencies for their role is EdFuel’s **Blueprint for Success competency maps**. Developed in collaboration with the Broad Center, NewSchools Venture Fund, Harvard’s Graduate School of Education, the Bridgespan Group, and 40+ sector leaders, the initiative includes seven functional competency maps (academics and instruction, advocacy, development, information and data, finance, operations, and talent) to show the knowledge, skills, and relationships necessary to manage school districts/networks.



EdFuel’s **Blueprint for Success competency maps** outline the skills and behaviors necessary for success in 7 core areas: **Academics, Data, Development, Finance, Leadership, Operations,** and **Talent**. All maps are open-source and available for download on EdFuel’s website using the links above.

5 SAMPLE 360 SURVEY QUESTIONS & RESOURCES

Gathering feedback from staff, parents, and stakeholders is a critical component of a Head of School evaluation. The board must seek this feedback to develop a comprehensive understanding of the Head of School’s performance, successes, and opportunities for growth. This process can understandably be nerve-racking to a leader, and boards should work closely with their Head of School to ensure that the endeavor is framed with a growth and support perspective. Despite the challenges in gathering this feedback smoothly and handling it with sensitivity, this is a core responsibility of boards in exercising oversight and holding the Head of School accountable.

We recommend that a board member with experience in management, evaluation, and/or human resources lead this part of the evaluation process to ensure it is handled efficiently, effectively, and with the appropriate level of professionalism, thoughtfulness, and sensitivity.

There are many resources boards can tap for external support in collecting 360 feedback. EdFuel’s **myBlueprint 360 tool** captures and synthesizes feedback through a survey, tailored to competencies for the recipient’s role. Competencies are selected from EdFuel’s **open-source competency maps**. Once collected, the feedback is synthesized and shared out in a final report. This tool is designed primarily to gather feedback from direct reports and from board members.

Sample from a myBlueprint report:

Scale: 4 = Exemplary, 3 = Proficient, 2 = Developing, 1 = Not Demonstrated		
Map: Academics		
Design And Development Of Academic Model > Academic Model Development And Continuous Improvement > Senior Manager/Director		
	Self	360
Effectively develops program standards and supporting content aligned with federal, state, and college/career requirements.	3	3.5
Effectively assesses student performance data to drive continuous improvement of programs, with school leader input and considering differing student population needs.	4	3.4
Strategically sources, pilots, and scales innovative models (e.g., blended learning) for specific areas of focus.	2	2.6
Consistently elevates areas of potential conflict between academic model and specific programmatic instructions to academics team to adapt the model.	3	2.4

ADVICE ON SEEKING FEEDBACK FROM FAMILIES:

When asking for feedback from families, there are a few considerations a board should keep in mind:

1. **Less is more:** While it can be tempting to ask families for input on a range of topics, a parent/family member is more likely to respond to a survey with fewer questions. You can find a set of sample questions below to use as a starting point.
 - a. *Note: the board should ask the Head of School what data is already being collected from families and utilize that information (in the aggregate) where possible, rather than collecting new data. If a family survey already exists, the board could consider adding a question or two to the existing survey rather than sending out another survey, which lowers response rate on both. See below for more information on the sample questions.*
2. **Accessibility matters:** A board should consider the community when designing the survey, particularly in regards to a few key areas.
 - a. **Language:** Do you have a high percentage of families who speak a language other than English? Boards should ensure that surveys are accessible to as many families as possible, and should use translation services when needed. Many schools utilize translation services in some capacity, and boards should work with their Head of School to determine if those services can be utilized for the purposes of survey translation
 - b. **Technology:** Many survey platforms are accessible by phone, but still require an email address to access the link itself. If possible, boards should work with their Head of School to determine how they can share information about the survey in other creative ways (e.g. providing the link on handouts that are sent home with students, giving access to a tablet during drop-off/pick-up, etc.)
3. **Tie to re-enrollment:** This survey is an opportune time for a board to gather feedback from families about the extent to which they are planning to stay at the school or leave at the end of the year. A final question that asks “How likely are you to re-enroll your child(ren) at this school next year, and why?” will allow a board to assess the extent to which families are satisfied with their overall experience.

SAMPLE 360 FEEDBACK QUESTIONS FOR FAMILIES:

The following are a set of sample questions that can be included in 360 surveys for families.

This list is not exhaustive and should be viewed as a starting point.

1. How satisfied are you with the education your child(ren) are receiving at this school? (1 - 5 scale with 5 as highly satisfied)
2. How satisfied are you with the leadership of <INSERT HEAD OF SCHOOL> (1 - 5 scale with 5 as highly satisfied)
3. What do you appreciate most about <INSERT HEAD OF SCHOOL>'s leadership? (open-ended response)
4. What suggestions would you give to <INSERT HEAD OF SCHOOL> for improving their leadership? (open-ended response)
5. What do you enjoy most about being part of this school community? (open-ended response)
6. What do you enjoy least about being part of this school community? (open-ended response)
7. How likely are you to re-enroll your child(ren) at this school next year? (1 - 5 scale with 5 as highly likely)

ADVICE ON SEEKING FEEDBACK FROM STAFF:

When asking for feedback from staff, there are a few considerations a board should keep in mind:

- 1. Less is more:** While it can be tempting to ask staff for additional input on a range of topics, staff members likely already fill out several surveys over the course of the school year. The board should ask the Head of School what feedback is already collected from staff members, and determine if additional surveying is necessary. Rather than add another survey, the board should consider adding a small set of questions to an existing survey.. You can find a set of sample questions below to use as a starting point.
- 2. Alignment with Head of School on who is asked:** the board should discuss the topic of who will be asked to provide feedback with the Head of School in the goal-setting conversation, so that there is full alignment between both parties in understanding whether the full staff will be asked or only a subset of staff members (e.g., a leadership team). This should be aligned with the culture of the school, the size of the school, and the extent to which existing surveys already collect staff feedback.

SAMPLE 360 FEEDBACK QUESTIONS FOR STAFF:

The following are a set of sample questions that can be included in 360 surveys for staff. This list is not exhaustive and should be viewed as a starting point. If an organization already utilizes staff surveys (such as Insight), the board should consider adding to existing surveys rather than creating their own.

Competency Questions

Competency questions should be front and center in the staff evaluation and should align with the competencies set by the board and the Head of School in the original goal-setting conversation. The structure of these questions can look like the following:

- Please rate the <INSERT HEAD OF SCHOOL> on the following competencies, according to the following scale (4=fully demonstrates, 3=demonstrates, 2=partially demonstrates, 1=does not demonstrate)
 - Advancement of a Culture Focused on Academics and Equity:** Promotes educational equity as a guiding principle across school network, and ensures it is reflected in curriculum, instruction, and program offerings
 - Cultural Competence:** Creates an organizational culture that embraces the importance of seeking and listening to diverse perspectives, both within and outside of the organization

General Questions

- What are the top 1-2 strengths of <INSERT HEAD OF SCHOOL>? (open-ended response)
- What are the top 1-2 growth areas of <INSERT HEAD OF SCHOOL> that could improve their leadership? (open-ended response)
- How likely are you to return as a staff member next year? (1 - 5 scale with 5 as highly likely).
 - If rated 1, 2 or 3: What are the primary reasons you would consider leaving your position? (Open-ended or a subset of options that allow for the board to assess whether it's a preventable vs. unpreventable reason)

School Culture and Satisfaction Questions

Most schools utilize a culture survey tool to assess teach and staff satisfaction, such as TNTP's Insight tool. Boards should work with the Head of School to utilize data from the existing survey rather than duplicate efforts. It is critical that the board understands staff perception when assessing the Head of School's performance. Thus, this data must be gathered and evaluated regularly. When reviewing the data, boards should disaggregate data by subgroups, such as race, ethnicity, gender, tenure, etc. to better understand whether gaps exist along lines of difference. For more information about assessing staff culture, please see the contact information for organizations at the end of this toolkit.

6 SAMPLE PROFESSIONAL DEVELOPMENT PLANS

The following are resources to utilize when developing a professional development plan in collaboration with the Head of School:

- [Creating a Strong Professional Development Plan: A “How To”](#)
- [Sample Script; Co-Creating a Strong Professional Development Plan](#)
- [A Guide To Job-Embedded Training](#)
- [Sample 70-20-10 Plan](#)

Excerpt from EdFuel’s Guide to Job-Embedded Training

Many tools and guides to providing strong professional development already exist. One such tool is EdFuel’s Guide to Job-Embedded Training, which includes resources on how to have professional development conversations and sample tools that can be utilized. For more information, please see the resources listed above.



FREQUENTLY ASKED QUESTIONS

WHO IS RESPONSIBLE FOR EVALUATING THE HEAD OF SCHOOL?

Collectively, the entire board is responsible for evaluating the Head of School. One board member should be assigned the responsibility of coordinating the evaluation process. This could be the chair of a special Head of School Evaluation committee, the Governance Committee, or the Academic Performance Committee.

It is important that the designated board member not be the board chair. Having the board chair lead the evaluation puts too much power, and too much responsibility, in the hands of one board member, and limits the leader’s opportunities to build a close relationship and have avenues for candid conversation with more board members.

I’VE NEVER RUN A SCHOOL. WHAT IF WE DON’T KNOW THE HEAD OF SCHOOL OR UNDERSTAND THEIR JOB WELL ENOUGH TO EVALUATE THEM?

If a board member attends all board meetings, participates on committees, and develops a personal relationship with the Head of School, he or she will be able to participate fully in the performance evaluation process. That being said, some board members often can provide more extensive feedback on certain competencies or goals than on others. Board members who joined the board less than three months prior to the formal evaluation may be excused from the evaluation process.

HOW MUCH TIME SHOULD THE BOARD EXPECT TO SPEND ON THE HEAD OF SCHOOL'S EVALUATION?

Each board member should anticipate spending a minimum of four hours each year on the Head of School's evaluation:

- One hour for a mid-year evaluation meeting to discuss year-to-date progress on goals
- Two hours to complete an evaluation process, including reviewing data such as parent and staff surveys as well as student achievement data
- One and one-half hour for a year-end evaluation meeting in June
- Committee or task force members leading the process should anticipate spending an additional four hours spread throughout the year, with those additional hours dedicated toward developing or revising the evaluation tool, compiling and summarizing data, and meeting with the Head of School. While this work is ongoing, it is heavy in the late Spring (which may vary depending on departures from the recommended timeline.)

HOW DO COMPETENCIES RELATE TO THE HEAD OF SCHOOL'S JOB DESCRIPTION?

When developing the core competencies against which the Head of School will be evaluated, the board should refer to the Head of School's position description. Ultimately, the board wants to choose competencies that, if demonstrated consistently by the Head of School, would indicate that the Head of School is able to achieve the goals set out in the goal-setting conversation. The board should discuss with the Head of School whether the Head of School will be evaluated on the full set of competencies aligned to the job description, or if a subset of competencies will be chosen each year that directly relate to the selected goals.

WHAT IS A SMART GOAL?

A SMART goal is Specific, Measurable, Achievable, Relevant, and Time-specific. CBP offers a [goal-setting tool](#).

HOW DOES A SMART GOAL DIFFER FROM A HEAD OF SCHOOL'S GENERAL RESPONSIBILITIES?

SMART goals should define special aims and targets within the scope of the Head of School's and board's responsibilities, but beyond everyday tasks.² For example, the Head of School is responsible for enrollment, and a job description might state that the Head of School is "responsible for ensuring that the school is fully enrolled." However, an elementary school that is opening a middle school next year might create a SMART goal around the number of applications:

To ensure that the sixth grade class of 45 students is fully enrolled: by January 31, collect signed agreements from 100% of the 25 fifth grade parents to determine those that will remain for sixth grade, and by February 15, collect at least 70 applications from new, prospective sixth grade students.

² SMART goals should be grounded in the Head of School's and board's responsibilities, but should not just be a rehashing of the responsibilities. Another example: the board is responsible for passing the school budget, but doing so should not be a goal. Passing the annual budget is the board's fiduciary obligation. It is an expected outcome (end result) but it does not count as a goal—i.e., something new to work toward.

WHY SHOULD THE HEAD OF SCHOOL'S SELF-ASSESSMENT BE INCLUDED IN THE EVALUATION PROCESS?

The Head of School should complete a self-assessment using the same tool the board will use to evaluate the Head of School. Boards should work to incorporate the Head of School's reflections in the evaluation, either through quoting or paraphrasing, to ensure their perspectives are brought into the process.

WHAT NEEDS TO BE IN PLACE PRIOR TO CONDUCTING A PERFORMANCE EVALUATION?

- An up-to-date job description for the Head of School
- A performance evaluation tool that the board and the Head of School mutually agree is appropriate for the school
- Pre-established goals and competencies against which the Head of School will be evaluated

SHOULD PARENT AND STAFF FEEDBACK BE INCORPORATED INTO THE EVALUATION?

Yes. Board members need to understand what school staff and parents perceive with regard to Head of School performance. Boards should gather parent and staff feedback using structured, thoughtful, anonymous survey instruments. This feedback can inform and enrich the board's perspective on the leader's performance, with the understanding that executive leaders sometimes have to make decisions in the best interest of the school that upset some number of teachers and/or parents. A board member with experience in HR and performance evaluation can be extremely helpful in this regard.

HOW FREQUENTLY SHOULD WE DISCUSS PERFORMANCE WITH OUR HEAD OF SCHOOL?

The designated board member responsible for the leader evaluation should formally meet with the Head of School at least twice during the year, once for a mid-year check-in and once to conduct the formal review. In addition, the Head of School should provide regular—at least quarterly—updates to the full board on their progress towards goals.

HOW DO WE DELIVER CONSTRUCTIVE FEEDBACK TO THE HEAD OF SCHOOL?

Board members should be honest, transparent, and concrete in their feedback, keeping in mind it is the board's role to both hold the Head of School accountable and provide support for success. The board has to develop a strong relationship with the Head of School, be clear about performance expectations, include the Head of School's self-reflection in the evaluation process, and position the evaluation process as a performance management and professional development opportunity. Boards that take these key steps will find it easier to deliver constructive feedback that gives the leader the information and input she needs to grow, develop, and succeed.

ADDITIONAL RESOURCES

The resources included in this toolkit are meant to provide a starting point for boards and should be adapted to best fit the needs of the Head of School and the organization. For more support, we suggest reaching out to any of the following organizations:

ORGANIZATION	MISSION	WEBSITE
Education Board Partners (formally Charter Board Partners)	To help ensure that every charter and autonomous school has an effective, strategic, diverse board that exercises strong oversight and works collaboratively with school leadership to ensure that all students achieve at high levels.	www.edboards.org
EdFuel	To empower education organizations to effectively recruit and retain diverse and high-quality staff through comprehensive and equitable talent management systems.	www.edfuel.org
School Leader Lab	To grow and sustain high-quality schools by developing one of their greatest assets: leaders.	www.schoolleaderlab.org
TNTP	To end the injustice of educational inequality by providing excellent teachers to the students who need them most and by advancing policies and practices that ensure effective teaching in every classroom.	www.tntp.org





edfuel

EducationBoardPartners