The Philadelphia School

Creating an Effective Support and Evaluation Process for a New Head of School

NAIS ANNUAL CONFERENCE 2020
The Philadelphia School

Derek Jokelson: Board Chair 2018–2021
   Head of the Search Committee for new Head of School in 2017–2018

Lisa Sun: Head of School since 2018

Questions for audience:

- Who’s in the room? Trustees? Heads of Schools? Other administrators?
- Who currently has a HOS evaluation system in place?
- How many of you feel like you have an effective HOS evaluation process?
The Philadelphia School
History and Timeline (1972–2007)

- Founded in 1972
- Pre-K through 8th Progressive School in Center City
- Not much administrative infrastructure
- Long term 23 yr HOS from 1983–2007
- Never had a formalized HOS review process
- Highly relational culture valuing faculty autonomy
From 2007 to 2018 there were efforts made to create a HOS review process but...

- No consistent or repeatable process
- Little focus on goal setting
- Periodic use of anonymous faculty surveys
  - “It felt like a gut punch” (former HOS on receiving anonymous feedback)

Three (3) Heads in that time period (7 yr Head; 4 yr Head; 1 yr Interim)
Impact (in retrospect)

- Distrust and loss of confidence between Head, Faculty, Staff and Board
- No clear boundaries in our various roles
- An episode of errant board members “investigating” the Head’s performance
- Heads of School feeling unsupported and undermined
- No *shared* understanding of the role of Board governance
A Call to Action (2017–2018)

- PAIS Accreditation Committee
- Interim Head helped to design a new process
- HOS Search Candidate, Lisa Sun
Research Phase (2017–2018)

Published Resources: Not comprehensive or consistent in their approaches

Here is the best of what we found:


One newer resource:
- NAIS Trustee Guide, Section 7, *Evaluate the Leader Against Concrete Goals Using a Fair, Transparent Process* (2019)

Interviews: Heads and Board Chairs at 12 similar schools and/or progressive education minded schools (local and national)
Research: Major Themes and Lessons

1. Information gathering is tricky
2. Growth mindset
3. Simple is better
4. Support (not just evaluation) is key
5. Process should reflect culture
Our New Process

Head Support and Evaluation Committee (HSEC)
2018–2020
The HSEC
(Head of School Support & Evaluation Committee)

Separate from Governance or Executive (with some overlap)

Kept it small (4 members + Head)
- HSEC Committee Chair
- Former Board member
- Another Board member
- Board Chair

Close Circle
Our Process: Timeline Overview

Summer: Goal setting

Fall and Winter: Support and conversation

Spring: Information gathering (and still supporting)

End of School Year: Reporting and repeating
Head and Board set goals in coordination with each other.

Head’s goals should be specific and actionable while still being flexible.

Head encouraged to set goals in 3 areas:
1. Strategy (from Strategic Plan)
2. School Program and Operations
3. Head’s own professional development

Goals are a tool for the Head.
Fall and Winter: Support and Conversation

FALL:
● Meet 1–2 times
● Establish trust
● Discuss goals

WINTER:
● December: Report to Board on progress on goals
● Plan for Spring
Spring: Information Gathering

1. HOS Prepares **self-reflection** post spring break
2. HSEC **interviews** a selection of Head’s direct reports
3. Two **Board surveys**
   - Board Source Board self assessment first, then Head assessment
4. Head Supplies HSEC with **dashboard** type data such as
   - Strategic plan progress
   - Attrition (students and faculty/staff)
   - Enrollment
   - Financial measures (surplus/deficits, reserves, etc.)
   - Fundraising
End of School Year: Report & Repeat …

- HSEC prepares a *draft* report to share with the Head
- Report is revised and condensed for presentation to the full Board
- Rinse and repeat
Outcomes and Reflections

Outcomes:

1. Creates real dialogue around support
2. The Board, and especially the HSEC, really knows the Head & her work
3. Board understands how the Head is performing
4. Identifies/implements strategies to support the Head’s growth
5. Provides a framework for the long term growth of the Head

Reflections: Lisa and Derek
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Links to:

1. History of the Research and Development of HOS Support and Evaluation Committee
2. The HOS Support and Evaluation Process
Questions?
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