

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

The Philadelphia School

Head Evaluation History and Timeline (2007–2018)

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:

- ISM Ideas & Perspectives, *The Head Support and Evaluation Committee: Technicalities*, Vol. 42, No. 13 (2017).
- Orem, Wilson, NAIS Trustee Handbook, Chapter 5, *A Culture of Assessment* (2017)
- Robinson, S., *The Head Evaluation: Assessing Constructs*, President's Blog, SAIS (2013).
- ISACS, *Evaluation of the Head of School*, An ISACS Monograph (1997, updated 2017)

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

Summer: Goal Setting

- 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

The Philadelphia School

Links to:

1. [History of the Research and Development of HOS Support and Evaluation Committee](#)
2. [The HOS Support and Evaluation Process](#)

Questions?

The Philadelphia School

BOARD CHAIR: Derek Jokelson DEJ@JOKELSON.COM

HEAD OF SCHOOL: Lisa Sun LSUN@TPSCHOOL.ORG

THANK YOU!!

Please rate this session in the 2020 NAIS Annual Conference Mobile App. Go to the workshop listing, click on the Clipboard icon to the left of the event description to provide valuable feedback on the workshop that you just attended.

