

# School Leader Evaluations

Maryland Alliance of Public Charter Schools  
**August 1, 2021**

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EducationBoardPartners

great boards. great schools.



**Education Board Partners** is the only national nonprofit organization dedicated exclusively to strengthening nonprofit boards in education. We focus our work to ensure **quality, equity** and **accountability**.

We are a team of teachers and educational leaders who believe **every child** deserves the opportunity to attend an excellent public school.



# Who to Evaluate?

We define the school leader as:

- Chief Executive Officer
- Executive Director
- Principal
- Head of School



# Key Roles

The school leader is responsible for:

- Managing the school
- Setting ambitious goals
- Ensuring the school meets its goals

The board is responsible for:

- school leader meeting their goals
- Offering feedback
- Providing support
- Identifying professional development opportunities
- Recognizing excellent performance



# Agenda

1	Welcome, Agenda, and Objectives
2	Temperature Check
3	Ensuring Exceptional Leadership
4	Role of the Board
5	Evaluation Process and Toolkit
6	Data Collection and COVID-19
7	Things to Consider



# Objectives

1. Define the school leader evaluation process.
2. Explore the school leader evaluation tools and resources.
3. Understand the role of the board in the school leader goal setting and evaluation process.



# Temperature Check





## Something to think about...

- What are key pieces of information/data that should be collected and considered when evaluating the school leader?
- How might a focus on Diversity, Equity, and Inclusion (DEI) impact the school leader's support and evaluation?



# Standards for Effective Governance



Focus relentlessly on student achievement



Recruit and retain an exceptional leader



Invest in exemplary governance



Act strategically and be accountable



Raise and use resources wisely



Commit steadfastly to compliance

**Center People, Culture and & Equity**

# Ensure Exceptional Leadership

Standard 2



# Ensure Exceptional Leadership

- Hire and support a strong school leader
- Evaluate and hold the school leader accountable
- Plan proactively for leadership transitions



# School Leader Competencies



Academic Leadership



Personal Leadership



Organizational Leadership



Talent Management

# Overall Evaluation Cycle



## ***What it is not...***

- a one and done conversation
- a collection of all the missteps and failures in a year

## ***What it is/What it includes...***

- an updated job description
- mutually agreed upon goals
- ongoing dialogue
- periodic reports to the board on school leader's progress
- well-rounded evaluation process, including input from different constituencies and the school leader
- formal delivery of evaluation with goals for the following year

# Plan for Succession



OR



**Perhaps the most important responsibility of a  
public charter school board:**

**Ensuring that your school has an excellent, high  
performing leader**



# Why?

- Research and experience are conclusive: a strong leader is essential for a high performing school
  - This oversight is the board's #1 job
  - Most powerful lever for accountability
- The school leader reports to the board
  - Leader needs/deserves feedback, recognition, and support to improve
- Finding a new leader is hard
  - Invest in helping good leaders become great
  - Work hard to retain great leaders
  - Research shows it costs about three times the school leader's salary to replace the leader



# Overarching Things to Remember:

- The board governs the **school** that must survive and thrive
  - The mission
  - The students
  - The public
- The school leader reports to **the board**
  - The board holds the charter
  - The board's responsibility is to the organization
  - The board manages only one person
- Transition can't be a secret, and it is always inevitable
  - Natural and healthy
  - The more planful the better
- It always comes back to the ongoing **relationship** the board has with the school leader



# Role of the Board



# Role of the Board vs. School Leader

Governance/Board	Management/School Leader
<ul style="list-style-type: none"><li>• Oversight function</li></ul>	<ul style="list-style-type: none"><li>• Implementing, planning, organizing and directing</li></ul>
<ul style="list-style-type: none"><li>• Assumes responsibility for the school's student achievement results</li></ul>	<ul style="list-style-type: none"><li>• Produces student achievement results</li></ul>
<ul style="list-style-type: none"><li>• Evaluates and supports the school leader/CEO/ED</li></ul>	<ul style="list-style-type: none"><li>• Evaluates and supports school staff</li></ul>
<ul style="list-style-type: none"><li>• Lead process and set short and long-term goals for board and approves leader's goals</li></ul>	<ul style="list-style-type: none"><li>• Works in partnership with board to establish individual and school-wide short- and long-term goals</li></ul>
<ul style="list-style-type: none"><li>• Recruits, interviews, and votes to add new board members</li></ul>	<ul style="list-style-type: none"><li>• Supports recruitment process, interviews candidates and provides feedback</li></ul>
<ul style="list-style-type: none"><li>• Evaluates and reports out on effectiveness of the board</li></ul>	<ul style="list-style-type: none"><li>• Provides input into effectiveness of the board</li></ul>
<ul style="list-style-type: none"><li>• Facilitates board meetings</li></ul>	<ul style="list-style-type: none"><li>• Actively participates in board meetings</li></ul>
<ul style="list-style-type: none"><li>• Raises money; gives personally</li></ul>	<ul style="list-style-type: none"><li>• Raises money</li></ul>

# Why are We Here Together?

Conducting equitable, efficient, and rigorous evaluations and providing ongoing support for leaders is critically important because it...

1

Ensures the board and the school leader **maintain shared expectations**

*No surprises!*

2

Allows the board to **recognize great performance** by the school leader/CEO/ED

*Retain them and help them get even better!*

3

Gives school leader strong and actionable feedback & strategic advice

*Everyone deserves feedback and opportunities to grow!*

**\*This is the board's most essential role as a body.\***

*The board is responsible and accountable for school performance, and conducting a strong, professional, annual evaluation is its most powerful lever.*

# What does it mean to support your leader?

- Establish and honor **trust**
  - Give candid, constructive, informed feedback regularly
  - Ask for feedback on the board
  - Stay in your lane, consistently
- **Know** them as a leader and as a person
  - Regular formal check ins
  - Regular informal time together
- Make sure that the leader feels **valued** by the school, staff and board
- Ensure that the leader knows that the board is **committed** to the school and demonstrates it through your actions
- Proactively seek opportunities to learn about the school leader's **successes** and accomplishments
- Include professional development in their goals and follow up on professional development plans
- Be an active ambassador for the school and for the school leader in the school and wider community



# Why is supporting the leader so important?

- **Retention**
  - A good school leader is hard to find
  - Leaders who feel supported and valued are better for the school
- **High performance to goals**
  - People who feel valued and supported are more likely to be effective in their jobs
- **Professional growth and development**
  - Helps the school leader, helps the school and helps the students



# Find ways to recognize small and large successes

- Frequent informal recognition
  - Call
  - Flowers
  - Notes
- Say thank you often
- Ask how you can help



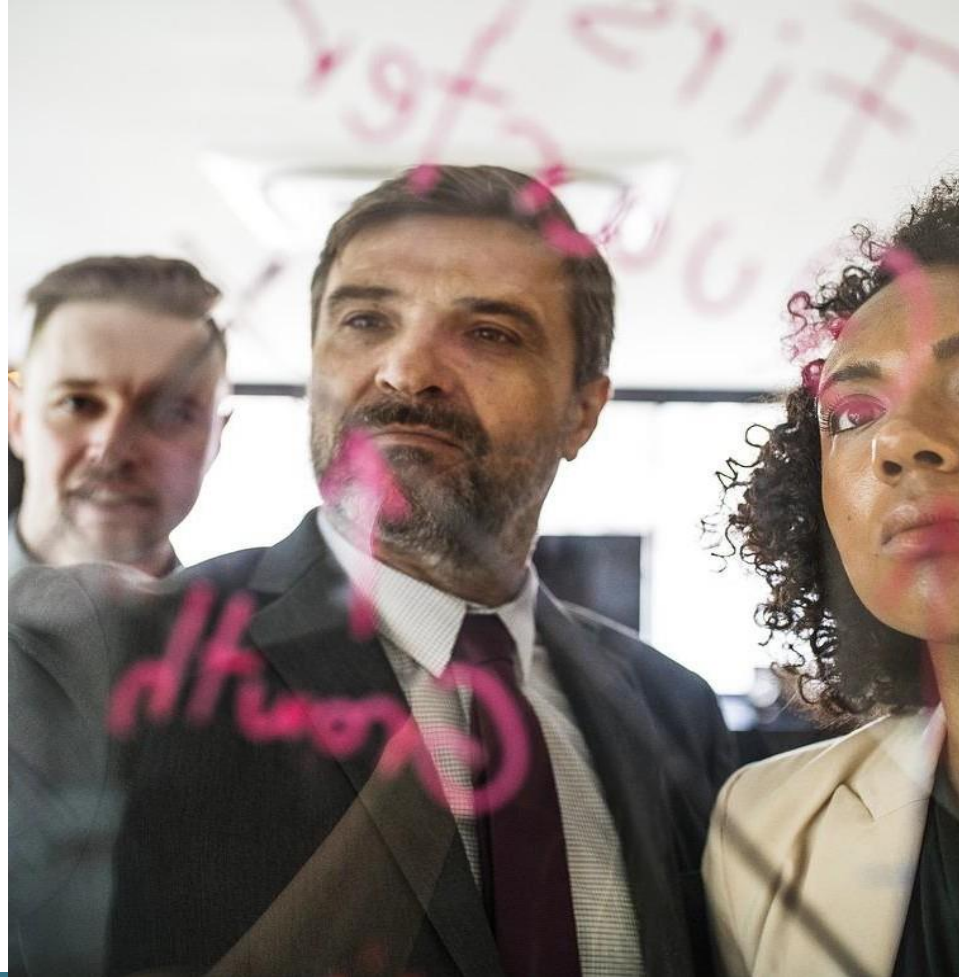


# The Evaluation Process



# Why Good Evaluations Matter

- Ensure the board and the school leader maintain a set of shared expectations.  
**No surprises!**
- Allow the board the opportunity to recognize great performance from your school leader. **The board needs to retain them and help the leader grow and get even better.**
- Give the school leader regular, strong and actionable feedback.



# Why Good Evaluations Matter

**Evaluating the school leader is the board's most essential role as a body.**

The **board** is responsible and accountable for school performance, and conducting a strong, professional and annual evaluation is its most powerful lever.



# Evaluation Components



## Key Success Metrics

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Analyzing progress and results on school's goals



## Qualitative Input from Key Stakeholders

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Synthesizing robust feedback from staff, families, and board on the school leader's leadership and organization's culture and direction



## Strategic Advice And Actionable Feedback

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Offering the school leader's "bird's eye view" advice and coaching on how to evolve and improve their strategic leadership

# An Effective Evaluation Cycle

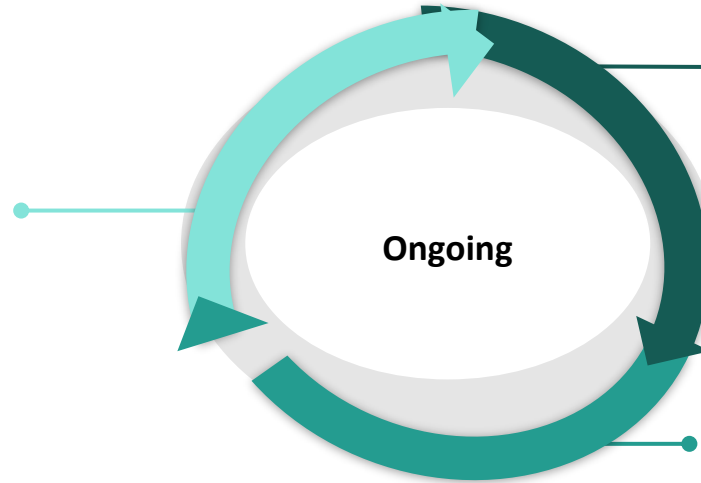
## FORMAL EVALUATION

*May-June\**

- Gather stakeholder input
- Gather relevant data
- Preliminary discussions
- Approve final report

## What it is NOT

- A one-and-done conversation
- A collection of what went wrong in the year
- An informal affirmation of “job well done”



## PREPARATION *Spring-Summer*

- Update job description
- Update evaluation instrument
- Set goals

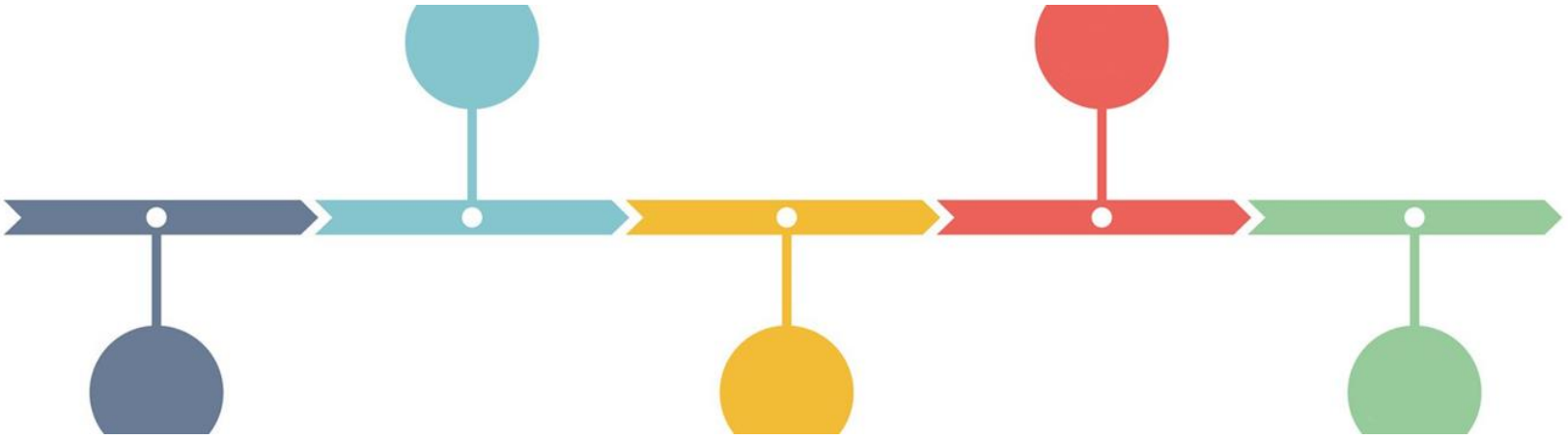
## MONITORING

*July-April*

- Track key metrics for progress toward goals
- Midyear formal check-in on goals

*Suggested timeline in a typical year to align with budgeting/contracting but can be shifted based on org context (particularly in this pandemic year)*

# Timeline: 30-60-90 Days



# Toolkit Walkthrough



# Background on the Education Toolkit

The *free* toolkit, created by EBP and Ed Fuel includes...

1

A clear and **streamlined process for evaluating the leader**, including a timeline

2

A list of **data sources** boards should tap to ensure they have full information about the leader's performance

3

**Easy to use/adapt templates** for the board's evaluation, the leader's self evaluation, and obtaining 360 feedback

4

**FAQs** to help clarify the process

5

**Links to helpful resources**, including competency maps



# The Evaluation Instrument: Template (sample)

Rating Scale: (1 = did not meet expectations, 4 = exceeded expectations)

	Rating	Brief Comment
<b>GOALS</b>		
GOAL 1: 95% re-enrollment.		
GOAL 2: Increase diversity of teaching staff by 15%.		
<b><u>Goals added due to the Pandemic:</u></b>		
GOAL 1: 95% of students have devices, WiFi access, and access to tech support.		
GOAL 2: Clear plan for reopening schools with safety plans, resources to support PPE and other needs, and 90% of parents and teachers indicating satisfaction with plan.		
<b>COMPETENCIES</b>		
Sets a clear vision for the organization, ensures full team understands it, and inspires team to achieve it.		
Creates and maintains a culture that values high performance and excellence.		
Creates and maintains a culture that values and prioritizes equity.		
Connects with others on a meaningful, personal level and builds effective professional relationships.		
<b><u>Competencies added due to the Pandemic</u></b>		
Adaptive leadership		
<b>OPEN-ENDED QUESTIONS</b>		
What has NAME done exceptionally well this year? What were some major successes?		
What are areas for growth/improvement?		
Please add any additional comments or thoughts here.		

# Lessons Learned: Where Boards & Leaders Get Tripped Up



Framing of evaluation is important,  
*especially now!*



Messy is ok!



Feedback is a gift and  
evaluation an opportunity



Gather data well, and then  
rely on the data



Own the board's role



Head + Heart



Push yourself to use an equity lens to  
challenge assumptions

# Data Collection and COVID-19



# What is Being Evaluated This Year?

1

## Goals

Most critical results to achieve in **THIS** pandemic year – these are likely different than what you planned in the past (align on this with the school leader prior to evaluation)

2

## Competencies

**Skills, knowledge, mindsets and orientations required to do the job well and sustain in role**, including unexpected ways in which the school leader rose to the occasion, and acknowledging crisis

*In particular, ask: **How did the school leader lead during these unprecedented times?** How did they display resilience, flexibility, and curiosity? Celebrate successes, strengths, and even missteps made in good faith.*

3

## Professional Development Plan

**Supports needed—for *this person, at this time in your context***—to achieve goals and demonstrate/develop competencies

# What Data Should You Review?

## Data in Every Year

- **Academic performance** of the organization
- Comprehensive insight into the **operational and financial health** of the organization
- **Top-line feedback on org and leader performance from surveys collected by school or network:**
  - (1) Parents and stakeholders
  - (2) Staff, including teachers
- **Specific feedback on the school leader's performance collected by board via evaluation tool:**
  - (1) Leader's self-evaluation
  - (2) Board evaluation
  - (3) Staff and direct reports 360 evaluation

## Additional Data Based on COVID-19

- **Adaptive leadership** – How effectively and thoughtfully did the school move to hybrid or online?
- **Student focus** – Did students have what they needed? (e.g. devices, wifi, SEL supports, SpEd support, community)
- **Communication** – Was the communication with parents, students, staff, board, and governmental agencies thoughtful and effective, and was it clearly two-way and responsive?
- **COVID-19 reopening plans** – Were these created and adapted with inputs from key groups?
- **Community and family services** – What were the other services created to meet needs, and were these decisions based on data? *(e.g., food service and ancillary services to families & staff)*

What other ideas do you have? Brainstorm in the chat!

# Identifying Academic and Engagement Data During COVID-19

## State Testing Data

- Did your state obtain a waiver? Did it make the state testing optional?
- Did your school take the test?

## Other Nationally Normed Programs

- Did your schools take any assessments such as NWEA MAP, PSAT, SAT, or ACT?

## Alternative Measures

- How can you gauge and report student academic progress and development to parents, students and the board?
- Are there formative assessments that you are tracking?

## Engagement and SEL Data

- What are you concluding as you review your student, parent, and staff surveys, re-enrollment data, absenteeism, tardiness rates, teacher retention, and discipline data?
- What patterns and trends do you see?
- Are there differences by race, gender and socioeconomic status?

# Remember the Competencies for the Role

The board and school leader should get clear on the 10 competencies (or most important skills) required to accomplish the goals and use data to evaluate the leader's strengths and areas for development.

**Sample Leadership Competencies** (*see EdFuel Competency Maps for more ideas*):



# What Questions Should You Ask When Reviewing the Data?

## Met

- What is working?
- Are our goals challenging enough?
- Are all campuses and all students successful?
- Where are there opportunities for improvement?

## Meeting Pandemic Year Challenges

- What unique challenges arose this year for your community and how did you meet those?
- Where are there opportunities to be bold, innovative, and even more student-focused in this “Pandemic Transition Year”?
- How can we prepare for the unexpected? How do we adapt and plan goals at this time?

## Not Met

- Which goals did we miss?
- By how much and why?
- Is there a trend or is this a blip?
- Are there gaps or differences by race?
- What are we doing about it?
- Are there resources to assist?



# Governance Implications of Data Review

In addition to serving as the basis of the school leader evaluation, the board can leverage this data to:

1

**Align on goals**, in partnership with the school leader and using an equity lens

2

Allocate resources and **set budget** to meet those goals

3

**Set fundraising targets** to cover key goals not covered by per pupil funding



Align on goals related to ongoing **Pandemic Transition and Recovery** (e.g., CARES Act funding deployment)

# What Comes Next



# Four Key Results from Evaluation Process

1

Written School Leader Evaluation and Delivery

2

Revised School Leader Job Description,  
Including Key Competencies

3

Professional Development and **Support Plan for the  
School Leader**

4

New Goals and Metrics for Coming Year Tied to  
Longer-Term Strategy

# School Leader Written Evaluation AND Evaluation Headlines

Competency Summaries

*See sample below.*

Goal Summaries

*Same framework as below.*

Top Three Strengths

*Share specific examples.*

Top Three Areas for Growth

*These are the basis for goal setting.*

Average Score	Goal/Evaluation Dimension
	Holds herself and her team members accountable for achieving outcomes
	Works effectively with the board
	Welcomes feedback from the board and other stakeholders
	Facilitates and makes time for collaboration consistently within and across the organization and with internal and external stakeholder groups
	<b>OVERALL COMPETENCY AVERAGE</b>

# Reviewing the Job Description

- Governance Committee or School Leader Support/Evaluation Committee sets time to review the job description and revise
- Changes in performance and expectations we saw this year might actually be great indicators of how to measure performance going forward – *we learned to value some different things!*
- Full board approves revised job description

In reflecting on this extraordinary year, what did we learn about school leadership and are there any aspects of the leadership job description that might change?

**Brainstorm in the chat!**

# Setting 3–5 Goals for Next Year – A Pandemic Transition Year?

**\*Setting the strategic direction of the school is one of the primary roles for a board, in collaboration with the leader.\***

Sample Goals *(see toolkit for more ideas):*

## Student Performance & Academic Goals

- 80% of SpED and ELL subgroups meet growth targets on standardized tests

## Financial Goals

- Increase individual giving revenue by 20% and the number of donors by 10%

## Operational Goals

- Meet or exceed annual enrollment projection (800 in SY19-20)

## School Culture Goals

- By mid year, parents are actively engaged and satisfied, as evidenced by 70% participation in events, and 80% participation on survey with 60% satisfaction rates

## Talent Goals

- 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

## Pandemic Transition Goals

- [Insert goals here]

**Brainstorm  
in the chat!**

# Governance Implications of COVID-19 and How to Incorporate These into Goals

- Boards must be courageous in helping the leader maintain **high expectations** and **ambitious goals** while addressing the realities of pandemic consequences
- This evaluation process can be a positive opportunity to reset and focus the organization on its most important strategic priorities
  - What are you **not** going to try to achieve in the coming year?
- Now is the time to **lean all the way in to equity > equality** in your goal setting
  - Set goals starting with the highest needs
  - Allocate resources accordingly
- Start goal setting by **grounding in what you have learned**
  - Ensure full board is engaged and all perspectives are actively valued
  - LISTEN to the school leader parents, and staff as you consider the most important goals

# Supporting the School Leader's Development

Following the evaluation, it is important for the board to develop an action plan to support the school leader so that they can be even more successful achieving goals:

This could include:

- Co-creating a **70-20-10 development plan** (see example below)
- **Allocating resources** so that the leader can work with an executive coach or participate in a skill- or network-building training
- Tapping board members with specific expertise to **provide ongoing support, strategic advice, and feedback**
- Ask the leader what they are interested in pursuing for professional development/growth

SKILL TO DEVELOP	EXPERIENCE-BASED ASSIGNMENT (70%)	WHO WILL YOU ASK TO HELP, AND HOW? (20%)	FORMAL TRAINING AND SELF-STUDY (10%)
<b>Change Leadership (Executive/Officer Level):</b> Champions change efforts and recruits sponsors from relevant constituent groups	Develop stakeholder / influence map of constituents impacted by new school opening	Board chair and members of executive committee	Read <i>Power: Why Some People Have It and Others Don't</i> by Jeffrey Pfeffer
	Design tailored recruitment strategies for top 5-6 key desired sponsors; implement with support from board and advisors as appropriate	2-3 peer CEOs who have gone through similar experience	
	Engage sponsors with a clear "ask" for support and create opportunities to maximize sponsor impact		



# In Conclusion And Next Steps

## Identify Who Will Lead the Process

## Align on Evaluation Instrument

## Implement Evaluation Instrument

## Gather and Assess Additional Data

## Create Written Evaluation and Deliver

### *Depending on your School:*

- Governance Committee
- School Leader Evaluation and Development Committee, or
- 1-2 designated board members

- **You can use the templates** in the toolkit *or* create your own
- The most important components to ask about in the survey include each specific goal, organizational culture, equity, and whichever competencies the board/leader identified as most crucial for the job this year

- **School Leader completes a self-evaluation** (can be done in parallel, or after the school leader sees the other input)
- Board members complete the **board evaluation**
- 5-8 direct reports and/or other staff complete the **360 evaluation**

- The evaluation lead(s) gather and consider relevant **data related to the goals and competencies**
- This could include student achievement, staff and parent satisfaction, staff and student retention, financial health, any external reviews, and more

- The **board meets in executive session** to formally discuss and align on the school leader evaluation
- The evaluation lead(s) **write a memo** detailing the board's formal assessment
- The evaluation lead(s) meet with the leader to deliver the assessment, highlight areas of strength and development, and **begin conversations about how to support the leader** in the pursuit of the organization's goals in the following year

# Reflections and Close



# Reflection & Commitment

- What was a significant learning for you?
- When reflecting about evaluating your school leader, where is your board strongest? Where is there room for improvement and growth?
- As a result of what you learned, what are 2-3 actions you can take to improve your board's ability to evaluate and hold your school leader accountable for executing to results?

# Looking for more information?

**For more information, resources and questions please visit:**

<https://mdcharters.org/renewal-on-demand>

## **RENEWAL RESOURCES FOR MARYLAND PUBLIC CHARTER SCHOOLS**

This website is a Maryland Alliance for Public Charter Schools (MAPCS) curated page, developed specifically for Maryland Public Charter Schools operators and administrators. More resources are coming soon. Please bookmark this page and check back periodically for updated renewal resources.

# Questions?

For any questions, please contact:

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