

Effective Practice - Director Evaluation

Trustee Academy

February 2, 2024

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Session Overview

- Effective practice in Director Evaluation
- Review of the Working Advisory Group Recommendations (Performance Assessment Guide)
- Reviewing a Typical Evaluation Process
- Practical Tips for Boards

What We Know About Effective Director Evaluation

- Literature Review shows trends towards:
 - Evaluation should include a narrative process to allow for board/peer/direct report feedback;
 - Ensure confidential feedback;
 - “Feed Forward” rather than “Feedback” – future focus orientation;
 - Performance should be measured against established goals and objectives; and
 - Evaluation is about ongoing growth and development.

Director of Education – Role Expectations & Quality Indicators WAG

- A Working Advisory Group (WAG) was created to review existing role expectations and quality indicators commonly included in the Director of Education Performance Assessment Guide used by many boards.
- The WAG included representatives from LEADS (Directors of Education), SASBO (Superintendents of HR), and Board Members.
- The WAG met throughout 2022.

WAG Purpose

- The WAG came together to review *Role of the Director – Appendix B – Performance Assessment Guide*
- Review Included:
 - Current State - Role of the Director – Appendix B
 - History & Changing Role of the Director
 - Current Role of the Director – engaging stakeholders
 - Best Practice Research
 - Recommend a Revised Appendix B – Quality Indicators for Divisions to adopt if they so wish

Analysis

The WAG focused on the following questions when analyzing the Role Expectations & Quality Indicators:

- Are the Quality Indicators providing evidence that the Role Expectations are being met?
- Are there any competencies/role expectations missing that are not currently being assessed?
- Are the Quality Indicators relevant for the Director Education role?



Stakeholder Engagement

- Met with:
 - Directors of Education
 - Saskatchewan Catholic School Boards Association
 - Faith Leadership
 - Board Members on the Committee provided the Board Member perspective



Analysis - Historical

- WAG Committee members met with Directors of Education to discuss:
 - Shifts in the Director role over the years
 - Work Load
 - Rural vs. Urban differences
 - Governance Shift



Analysis – Current Role of Director

- Expanding Role & Emphasis on:
 - Strategic Planning
 - Crisis Management & Risk Management
 - Business Continuity
 - Communications/Media
 - Client Expectations
 - Director/Board Relationship
 - Increased Health Component of staff & students
 - Truth & Reconciliation
 - Educational Leadership

Director of Education - Feedback

Quality Indicator Gaps – these need to align with the appropriate Role Expectations. This committee found that although it was tasked with analyzing and recommending changes to the Appendix B – Quality Indicators, it found it was impossible to do so without assessing and making recommendations to the required Director Role Expectations as well. The following Director Role Expectations were missing which are more reflective of today's expectations of a Director:

- Equity, Diversity, Inclusion and Accessibility (EDIA)
- Reconciliation
- Risk Management
- Social Responsibility
- Governance
- Faith Leadership – needs to be a separate Role Responsibility added to the Catholic School Division Appendix B

Director of Education - Feedback

Director Performance Evaluation

- Needs to be a continuous process, not just a snapshot in time
- Directors want it to be a more formative process that occurs throughout the year and want all work to be considered rather than year-end accomplishments only.
- Directors feel the evaluation process should be a mutually agreed to process between the Director and the Board.

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Director of Education - Feedback

Director Evidence Package

- Creates a lot of work on behalf of the Director
- They are finding the Evidence Package they put together not referred to or reviewed in any detail
- Some feel it becomes a duplicate process because they have provided accountability reports throughout the year to their boards and then must also provide the year-end report within the Director Evidence Package.

Director of Education - Feedback

Board Member Training in Conducting Evaluations

- Needs to be training for Board Members on how to effectively conduct evaluations
- Evaluation process needs to be clear.
- Needs to be an Accountability piece.
- Delegation of Authority needs to be clear.

Director of Education - Feedback

360 Degree Tools

- Include the Directors when picking 360 Degree interviewees
- Current process – it is not clear how the interviewees are chosen



Analysis – Shifts in Evaluation Processes

- Evaluation is central to good governance
- Evaluation makes clear the core responsibilities of the Director but is also central to:
 - The performance of the organization
 - The actualization of the Board's Strategic Plan
 - Influencing change and innovation in the organization
- Evaluation is about ongoing growth and the development, empowering the Director, not just about compliance

WAG Recommendations

- Continue with Peer/360 Degree Interviews
- Training for Board Members - Director Evaluation
- Do away with Director Evidence Package
- Consider alternatives such as tracking and recognizing Accountability Reports given by the Director throughout the year as part of the on-going evaluation and recognition the Director is meeting the role responsibilities

WAG Recommendations Continued

- Utilize the evaluation process to identify and support Director ongoing growth and development in areas that have seen significant change (EDIA, Risk Management, Social Responsibility, Governance, Communications/Media)

Revised Director of Education RE's & QI's

Revised Role Expectations include:

1. Student Learning & Well-being
2. Educational Leadership & Leadership Practices
3. Governance
4. Fiscal Responsibility
5. Human Resource Management
6. Policy & Administrative Procedures
7. Director/Board Relations & Governance Support
8. Strategic Planning & Reporting
9. Organizational Management
10. Communications & Community Relations
11. Leadership Practices
12. Faith Leadership (embedded for Catholic Boards)

Note: Equity/Inclusion, Reconciliation, Risk Management, Social Responsibility QI statements are embedded within the Quality Indicators.

<https://saskschoolboards.ca/publications/policy-advisories/>

Evaluation – A Typical Process

1. Planning Phase - Initial Conversation
2. Mid-Year Check-In
3. Final Evaluation

Evaluation Process – Step 1

Planning Phase:

- Board Reviews Role Expectations (RE) & Quality Indicators (QI) – Role of the Director Policy (These are typically outlined in Board policy.)
- Board Reviews Director's previous year's evaluation
- Meet with Director to determine:
 - Role Expectations for the year
 - Professional growth and development objectives for the year
 - Determine what success looks like and how it will be measured

<https://www.srsd119.ca/board-policy-handbook-2/>

Evaluation – What Not to Do



Evaluation Process - Step 2

Check-In Phase:

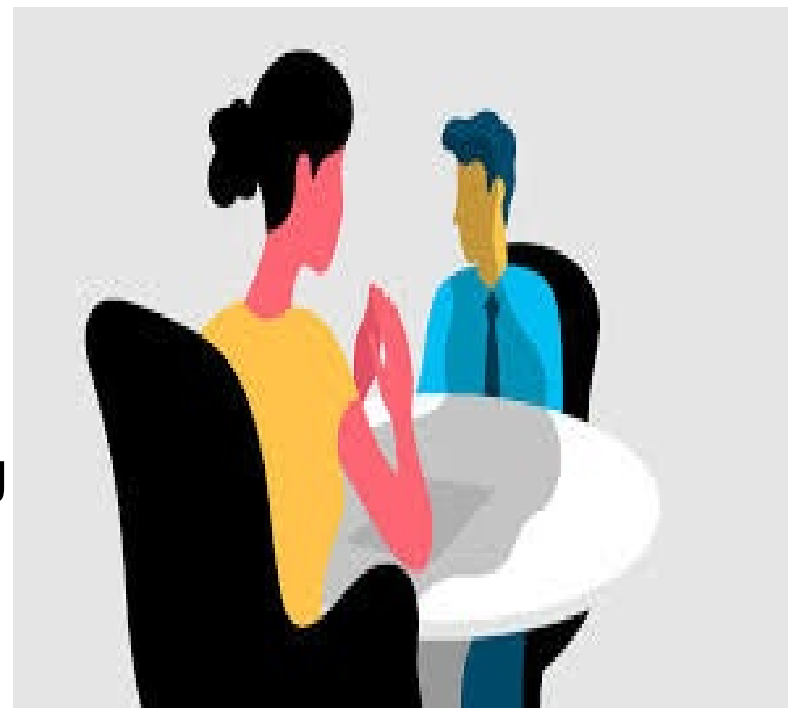
- Consists of Check Ins (formal & informal throughout the year)
- Be cognizant of changing objectives (adaptive)
- Collaborative
- Support Director personal & professional growth & development opportunities



Evaluation Process - Step 3

Final Evaluation (Board Preparation):

- Add Evaluation in September Board Meeting
- Ensure Evidence based approach
- Utilize multiple data sources

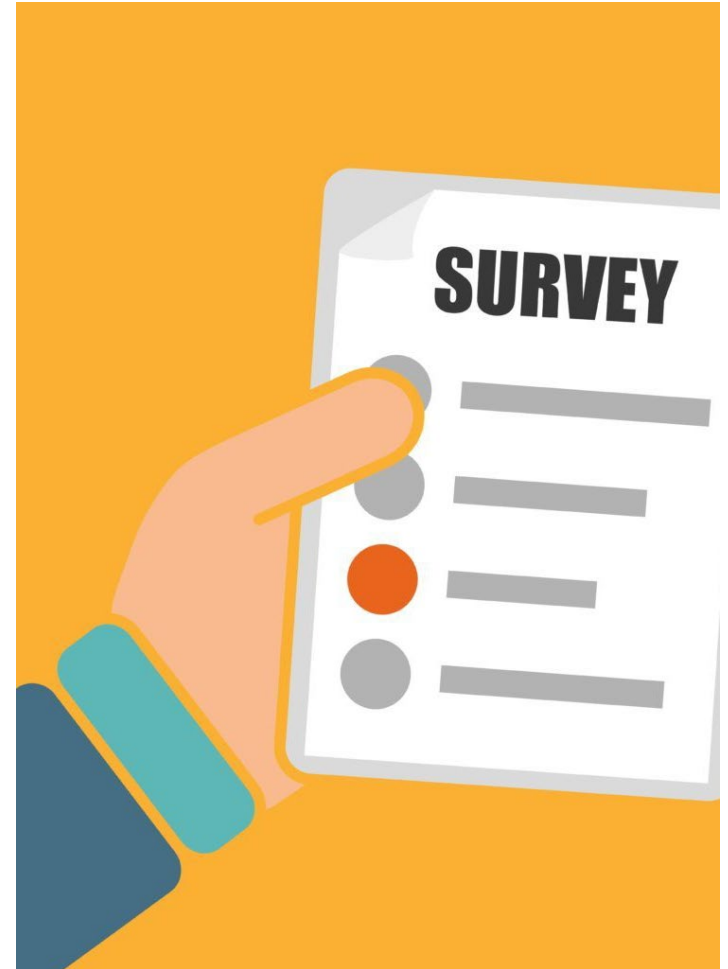


Final Evaluation

- Director Self Evaluation Data (Evidence of Performance)
- 360 Degree Evaluation & Interview Data (Evidence of Performance)
- Board Member feedback
- Facilitated Dialogue around the Data
- Report

SSBA Supports for Director Evaluation

- Survey Creation
- Conduct Surveys & Interviews (voluntary; ensure confidentiality)
- Facilitate Results Discussion
- Report



Final Evaluation

School Division Board of Education – Director Evaluation

June 20, 2020 – 9:00 a.m. – 12:00 noon

School Division – Board Room

Agenda

9:00 Opening and Welcome

9:05 Overview of Process

- **Overview of the agenda and process**
- **Does the process meet the Board's expectations? Questions?**

9:15 Director of Education Evaluation

- **Overview of Process Per Board Policy XX**
- **Analysis of Data: Board Survey Regarding Director of Education Performance**
- **Analysis of Data: Principal/Central Office Interviews Regarding Director of Education**

Performance

- **Analysis of Data: Evidence of Performance Presented by Director of Education**
- **Dialogue with Board of Education and Director of Education Regarding Data Collected**

10:45 Break

11:00 Closed Session with Board of Education

11:30 Draft Director of Education Evaluation Report (confirm findings from the evaluation)

11:45 Reflections/Feedback on the Process

12:00 Adjourn

Intent is to Improve Effectiveness

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"It's not that you're under-performing so much
as you're over-failing."

Tips For Boards

- Include your Director in the **planning**
 - Come to an understanding of what the work is, how it will get accomplished and determine what success looks like
- **Collaboration** is key
- **Communication** is paramount
- Focus on **Role Expectations & evaluate using criteria (QI's)** based on those role expectations
- Focus on **growth and development**
- **Make evaluation a key priority**

Tips For Boards

- Do Your Homework (engage in the process & review materials in preparation)
- Ask Good Questions (learner vs. judge mindset, commit to a learning-oriented evaluation approach)
- A Transparent Process (lead or have facilitated a process that is clearly understood by the board and Director)
- Document (produce a report that documents the discussion during the evaluation)
- Ongoing Growth & Development (the board's expectations should be clear in the final report)
- An Ongoing Conversation (not one and done, diarize follow-up progress discussions in board calendar work plan)

Questions