

# Effective Practice - CEO Evaluations

Trustee Academy

February 7 & 10, 2020



# Overview

- Provide best practice effective Director Evaluation
- Opportunity to gauge where your board is at
- Tools to assist boards in assessment of the Director
- SSBA Support
- Sask Rivers Perspective

# Why is Director Evaluation Important?

- Director is the Chief Executive Officer
- Director implements the board's strategy
- Leadership role is key
- Board is responsible to ensure Director is successful

# Purpose of Evaluation

- Evaluation allows an assessment of performance
- One of the board's most important responsibilities
- Valuable governance tool:
  - Clarifies Leadership role
  - Sets expectations
  - Fosters positive Board-Director relationship
  - Creates environment of continuous improvement & accountability

# Current Practice

What is your board's current practice?

Is what you are doing assisting your Director to get better at their job?

Is your process done "to" the Director or "with"?

Is the intention to improve performance or find faults?

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Performance appraisals

# Evaluation Steps – A model

1. Planning Phase - Initial Conversation
2. Check – In
3. Final Assessment

# Evaluation Process – Step 1

## Planning Phase:

Job Description

Required Competencies

Set standards of performance



# Job Description

- Outlines Director role & responsibilities
- Focuses in on the duties & competencies

# Competencies - Director

- Educational Leadership
- Fiscal Responsibility
- Personnel Management
- Strategic Planning
- Effective Communication

# Set Standards of Performance

- Typically annually
- Tied to Board Policy & School Division Strategic Plan
- Collaborative Discussion
- Establish goals and identify quality indicators of success

# Planning Phase

- Dialogue regarding performance expectations for the year
- Discuss & Outline personal & professional development opportunities
- Determine realistic measurable criteria

# Sample Work Plan

# Evaluation – What Not to Do



# Evaluation Process - Step 2

## Assessment Phase:

- Consists of Check Ins
- Decide timelines
- Be future focused
- Collaborative
- Adaptive



# Evaluation Process - Step 3

## Final Assessment Phase:

- Evidence based
- Utilize multiple data sources
- Provide Feedback



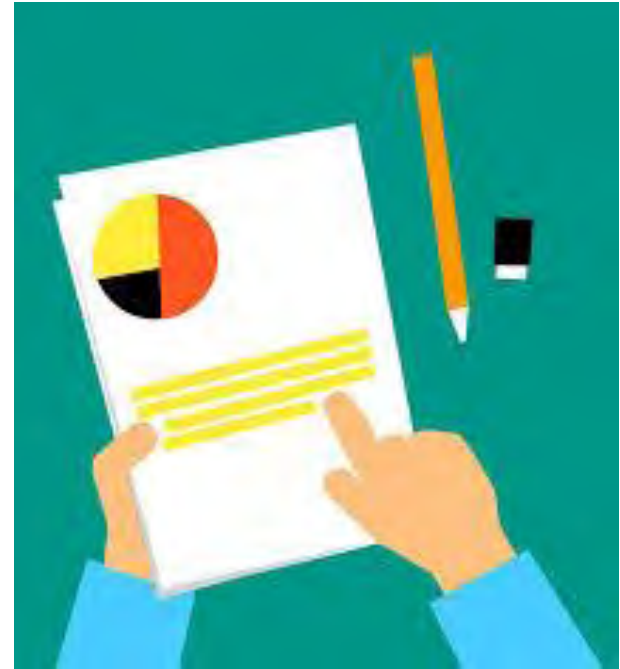


# Final Assessment

- Director Self Assessment
- 360 Degree Assessment & Interview Process
- Report
- Facilitated Feedback Process

# Self - Assessment

- Director - Evidence Portfolio



# Final Assessment

- 360 Degree Assessment - Survey
  - Board Chair/Board
  - Peers
  - Direct Reports



# Interview Process

- Director Reports
- Conducted by 3<sup>rd</sup> Party Neutral

# SSBA Director Evaluation

- Survey Design
- Conduct Survey
- Provide Results/Report
- Results Discussion



# Final Assessment

- Facilitated Feedback Process



# Final Assessment

**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**

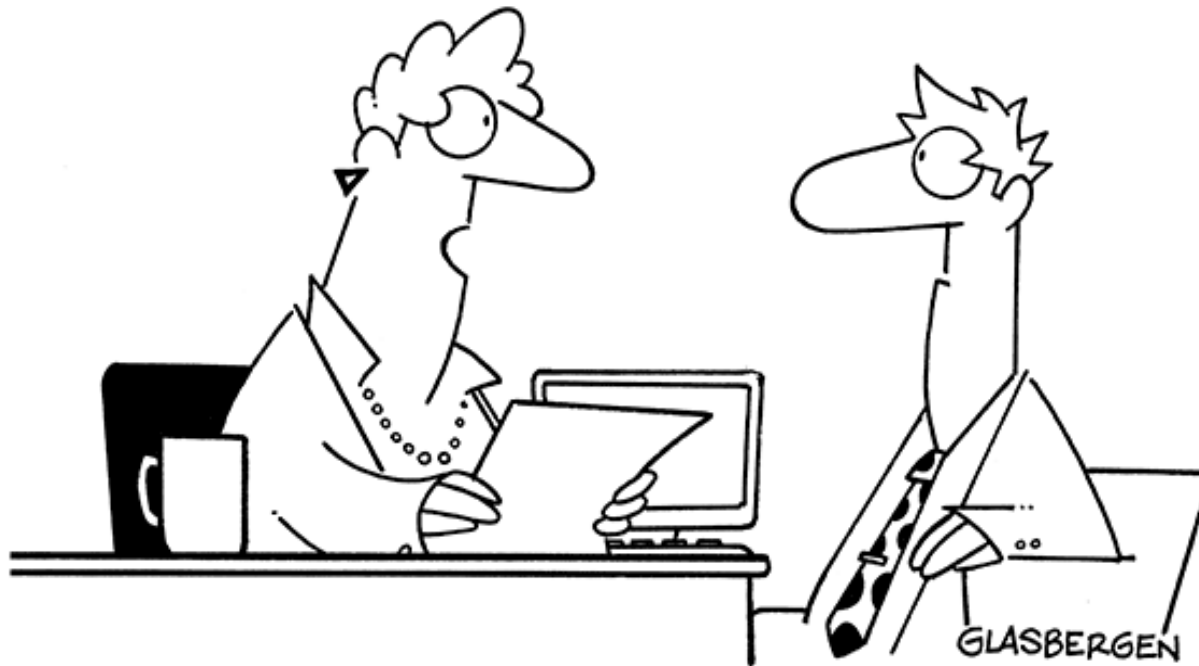
**10:45 Break**

**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**



**“I like to begin every performance review with a compliment. Boy, I look good today!”**



# Intent is to Improve Effectiveness

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

# Intent is to Improve Effectiveness

- Ensure opportunity for feedback from others, Board Chair/Board, as well as self-evaluation
- In person meetings are optimal
- Focus on criteria not on the person
- Highlight the positive and position gaps as opportunities to improve
- Make Evaluations a key priority

# Things to Remember

- 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 **competencies & assess using criteria** based on those competencies
- Focus on **growth**

# Board Chair/Board – How to Prepare

- Prepare in advance
- Understand your role & the role of the Director
- Plan WHAT you need to measure
- Determine best methods of HOW to measure

# Thank You



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