

Best Practices for Head Evaluations

Professional Development Series
December 3, 2025

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Senior Executive Compensation and Leadership Strategist



Mission & DATA

Mission-driven, Data-informed Leadership and Governance

**Mission
Driven**

+

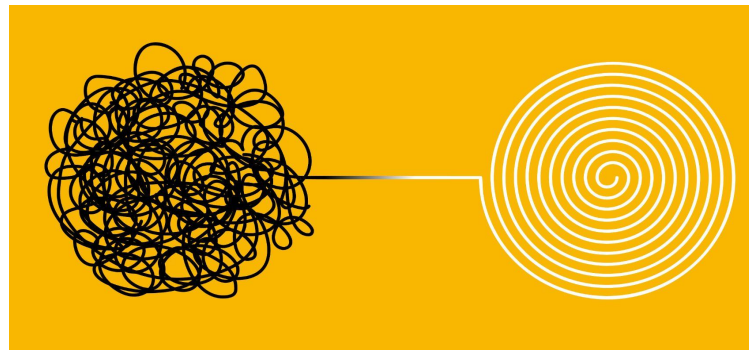
**Community
Centered**

+

**Data
Informed**



DASHBOARDING, DATA ANALYSIS & DATA WAREHOUSING



DATA STRATEGY & INSTITUTIONAL RESEARCH



EXECUTIVE & ORGANIZATIONAL COMPENSATION



FINANCIAL & ORGANIZATIONAL SUSTAINABILITY



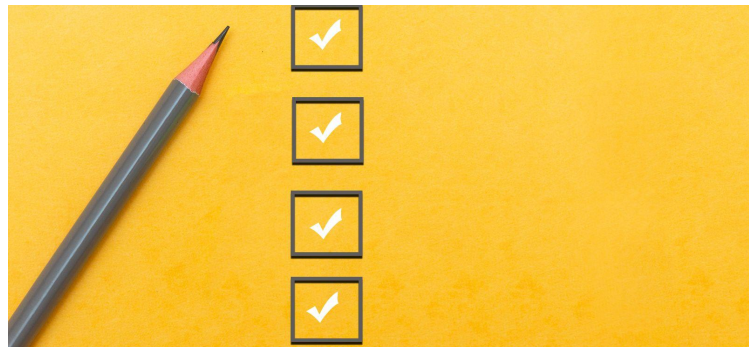
GOVERNANCE EDUCATION, AUDITS & ADVISING



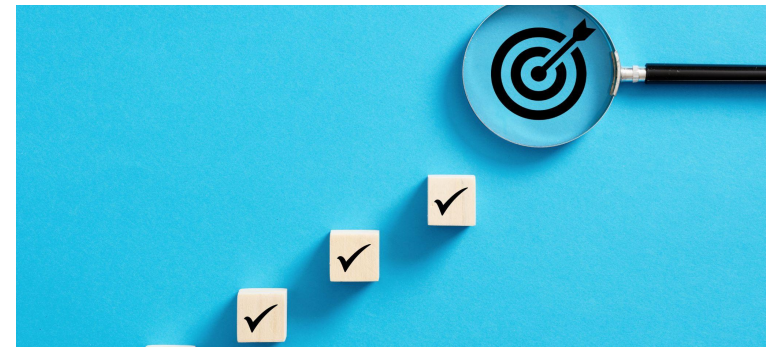
MISSION-DRIVEN, DATA-INFORMED COACHING



ORGANIZATIONAL EFFECTIVENESS & TRANSFORMATION



STAKEHOLDER SURVEYS & INTERVIEW STUDIES



STRATEGIC PLANNING & PROGRESS ACCOUNTABILITY

We are the trusted partner across our industry

256

**Independent School
Clients**

26

**Membership
Associations**

Strategic Data Partners



Other National/International Partnerships



10+ State & Regional Associations

Agenda

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Measuring Success

2

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Case Studies

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Questions & Discussion

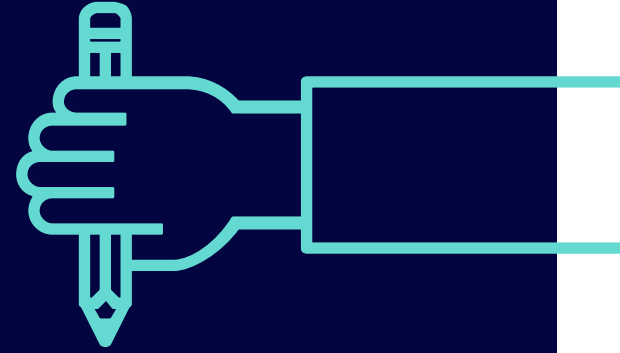


Who's in the room?

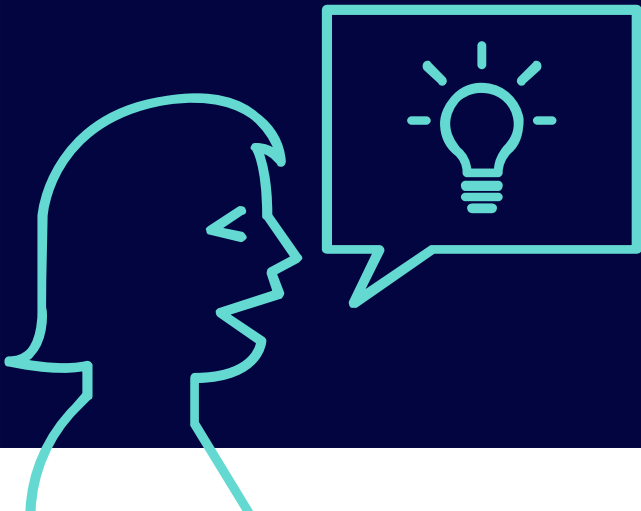
- Board Chairs
- Trustees
- Heads of School
- Others?



Please Raise
Questions at
Any Time!



Measuring Success



SO MANY
different words
to describe how
to move from a
30,000 ft vision
to measurable
progress.

KPIs Outcomes
SMART Goals
Metrics
Evidence OKRs
Goals
Success Signals

Goals, Outcomes, Metrics, Oh My!



- **Goals:** Goals are normally broad in scope, more aspirational/directional, and hard to measure.
- **Outcomes:** Outcomes are what you hope to achieve when you accomplish the goal. They are specific and measurable.
- **Metrics:** What we use to determine progress towards stated outcomes (data).

Types of Outcomes

Operational

Improve fundraising efficiency through online tracking of donors

Tactical

Increase enrollment by 25%

Performance

Increase AP scores in associated advanced courses

Cultural/Subjective

Improve student health and wellbeing

Aligned Metrics

Operational, tactical and performance outcomes are concrete and data can be pulled easily to determine progress.

Cultural/Subjective outcomes are more complex and “squishy”. We use Google’s **Goals - Signals- Metrics** protocol.



By unpacking the squish,
which quantitative and
qualitative metrics
emerge?

How could they
be gathered?



Mission, Vision, & Values

Evergreen Pathways or Pillars

Shared understanding of what your organization will always aim to do

Strategic Goals & Priorities

Lofty, aspirational goals language that often gets handed down to a team during strategic planning

Outcomes

Defining what success looks like. Priorities can be aspirational, this is when you get down to brass tacks and operationalize (who, when, where & what)

Metrics to Track Progress

What are the indicators that you are watching to monitor progress and understand if you are successful?

Evergreen Pathways or Pillars

Shared understanding of what your organization will always aim to do

Strategic Goals & Priorities

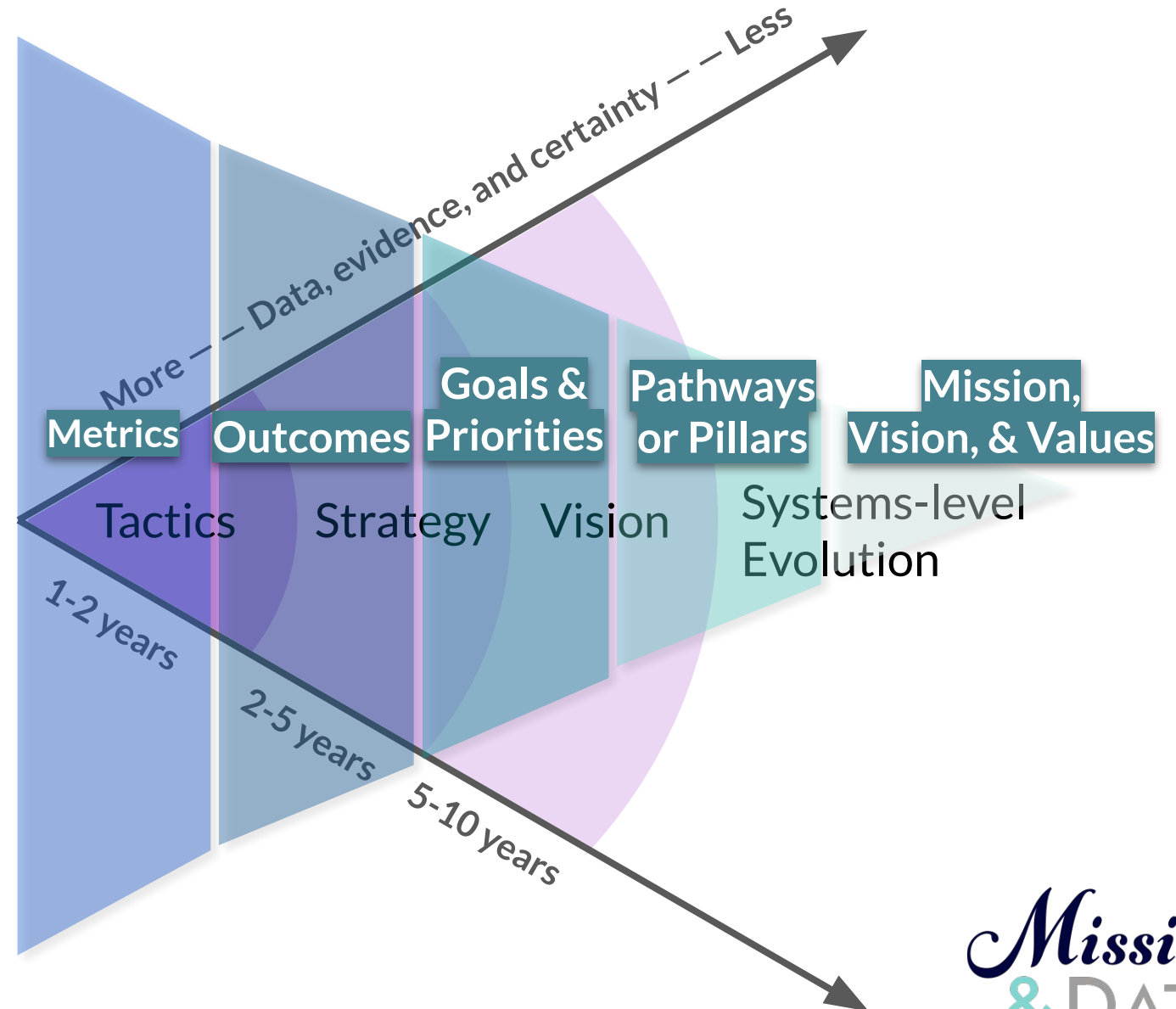
Lofty, aspirational goals language that often gets handed down to a team during strategic planning

Outcomes

Defining what success looks like. This is when you get down to brass tacks and operationalize (who, when, where & what)

Metrics to Track Progress

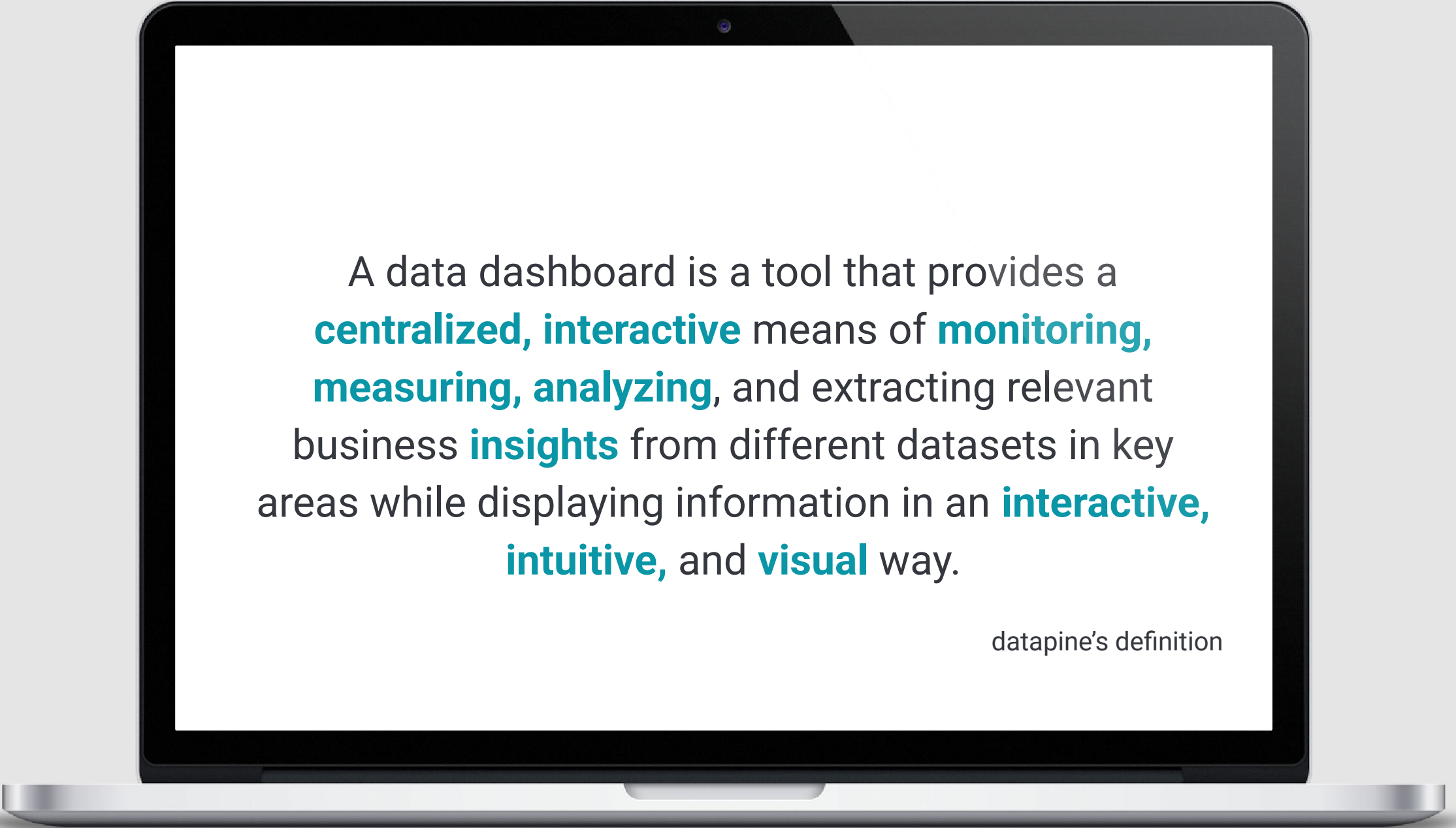
What are the indicators that you are watching to monitor progress and understand if you are successful



Graphic based on Amy Webb, Future Today Institute

A laptop with a silver base and a black bezel around the screen. The screen is white and displays the text 'What exactly is a dashboard?' in a bold, teal-colored font. The text is centered and occupies the middle portion of the screen. The laptop is open and viewed from a slightly elevated angle.

**What exactly is a
dashboard?**

A laptop with a silver finish and a black bezel around the screen. The screen is white and displays a paragraph of text. The text defines a data dashboard and lists several key functions in teal. The laptop is centered against a light gray background.

A data dashboard is a tool that provides a **centralized, interactive** means of **monitoring, measuring, analyzing**, and extracting relevant business **insights** from different datasets in key areas while displaying information in an **interactive, intuitive, and visual** way.

datapine's definition



This is not a dashboard,
it's a spreadsheet

No attempt to measure,
analyze, or provide insight

No visual component

No interactivity

Attrition Dashboard									
Student Name	School Year	Grade Level	Reason	Tuition Assistance	Gender	Race/Ethnicity			
Student 1	2020-21	1	Out of State/Country Move		Female	White			
Student 2	2020-21	1	COVID-19	>50%	Female	Latinx			
Student 3	2020-21	2	Different Independent School		Female	White			
Student 4	2020-21	2	Local Move		Male	White			
Student 5	2020-21	2	Out of State/Country Move		Female	White			
	2020-21	2	Learning Needs		Male	White			
	2020-21	2	Grade Level Dispute		Female	Multiracial			
	2020-21	3	Different Independent School		Female	White			
Student 9	2020-21	3	Learning Needs	>50%	Female	Multiracial			
Student 10	2020-21	3	Learning Needs		Female				
Student 11	2020-21	3	Public School		Female				
Student 12	2020-21	3	Out of State/Country Move		Male				
Student 13	2020-21	4	Homeschool		Female	White			
Student 14	2020-21	4	Local Move	<50%	Female	White			
Student 15	2020-21	4	Financial	>50%	Male	White			
Student 16	2020-21	5	Out of State/Country Move		Male	White			
Student 17	2020-21	5	Public School		Female	White			
Student 18	2020-21	5	Struggled with Friendships		Female	White			
Student 19	2020-21		Out of State/Country Move		Male	White			
Student 20	2020-21				Male	White			

DEMO

Attrition Dashboard

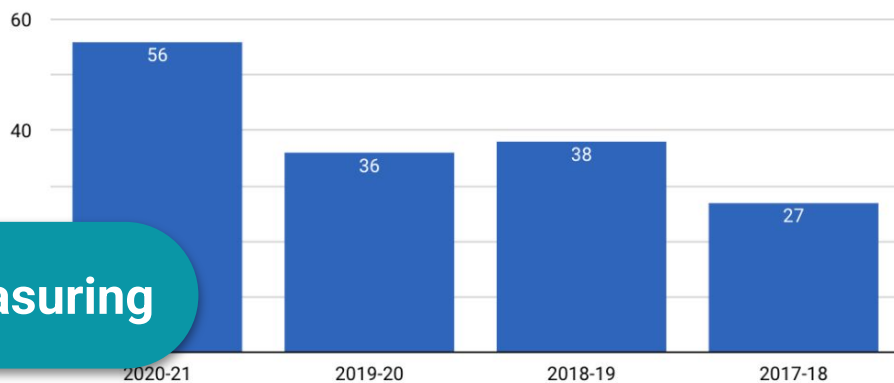
Interactive

Drill Down by School Year

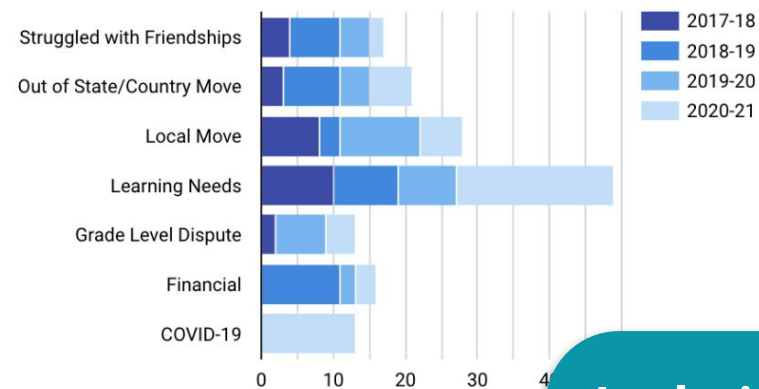
Drill Down by Grade Level

Drill Down by Reason

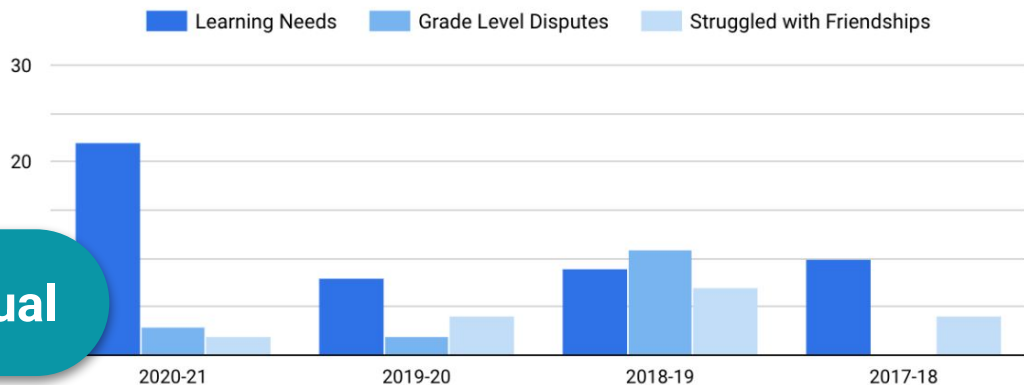
Students Leaving by Grade



Students Leaving by Reason



Looking Closer at Programmatic and Social Reasons



Analysis & Insights

Analysis

Students that leave to find better accommodations for their learning needs has been the top cause of for-cause attrition (not due to families moving). Moving online for COVID-19 exacerbated this problem. Not having adequate learning support has cost the school \$256,000 in lost tuition revenue in the past four years.

Suggestions

1. Revisit admissions screening process for students with advanced learning needs.
2. Hire learning specialist (average salary is

Monitoring & Measuring

Intuitive & Visual



Analysis
(Aggregations)

Guess what - this is a
dashboard!

Visual

Interactivity - you
can move the
stickies around

Insights

However... not easy to read and
limited to one physical space.



DEMO

SWOT Analysis

To Filter Data by Constituent Group:
Click on / off the constituent group to the right.

To Filter Data by Theme or SWOT Quadrant
Click on a row (theme) or a column (SWOT Quadrant) in the table below. Clicking on an individual cell will filter by both criteria (theme x SWOT Quadrant).

<input checked="" type="checkbox"/> Filter by Constituent Group	# of Comments
<input checked="" type="checkbox"/> Faculty	25
<input checked="" type="checkbox"/> Students	8
<input checked="" type="checkbox"/> Trustee / Admin	6

Interactive

Theme	Weaknesses	Threats	Strengths	Opportunities
Academics / Curricular Program	8	-	6	25
Admissions	1	3	-	1
Affordability	-	18	-	-
Athletics	-	-	5	1
Communication	10	-	-	-
Community / Relationships	2	3	39	3
Diversity, Equity, and Inclusion	19	5	1	8
	26	6	-	8
	3	4	2	2
	1	1	3	15
Mission-Purpose	13	7	5	12
Outside Trends	-	18	-	5
People	2	4	25	4
Reputation / Marketing	11	7	3	5
Student Experience	4	3	12	6
Well-Being	2	4	1	1
Willingness to Change	2	11	1	1

Analysis & Insights

SWOT Quadrant ① ...	Comments ② ^
Strengths	Building a sense of community
Strengths	Building community, belonging
Strengths	Building maintaining relationships
Strengths	Building relationships
Strengths	Caring community members
Strengths	Close relationships between faculty and students
Strengths	Community
Strengths	Community and culture
Strengths	Community and our ability to move forward and change the strength of community
Strengths	Community sense of belonging and character
Strengths	Connection to students
Strengths	Conveying a strong sense of community and unity
Strengths	Growing sense of community
Strengths	Inclusion and equality
Strengths	Informal environment that invites dissenting perspectives and challenges
Strengths	Loving, caring relationships
Strengths	Making everyone feel welcome
Strengths	Our devotion to uniqueness and community
Strengths	Our students are generally very accepting of each other
Strengths	People care a lot about kids
Strengths	Prioritization of belonging
Strengths	Prioritizing relationships
Strengths	Relationship with students and faculty

Clear Visual

DEMO

Board of Trustees Dashboard

Financial Operations Overview

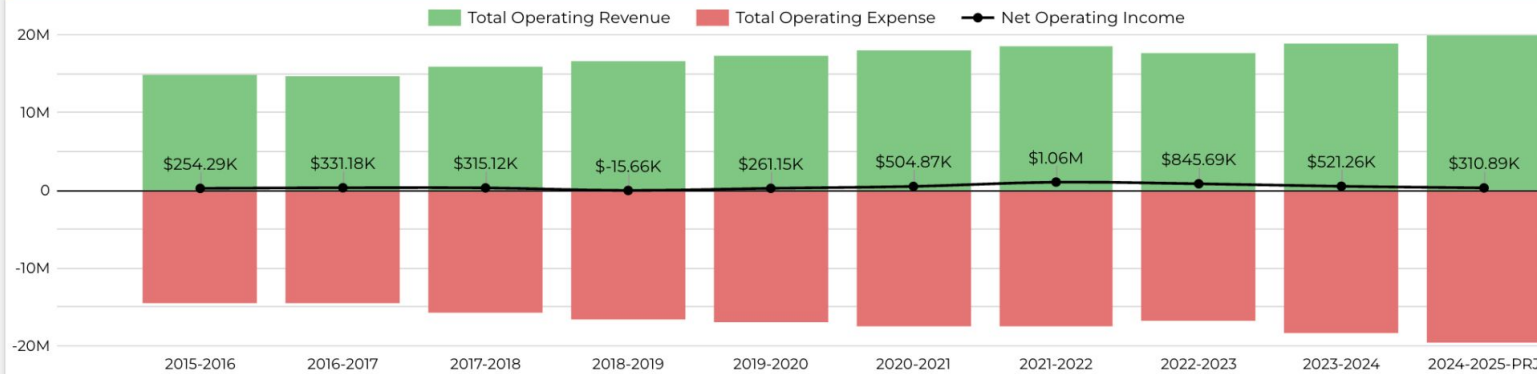
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Leadership and Governance.

Last Updated: Jul 29, 2024

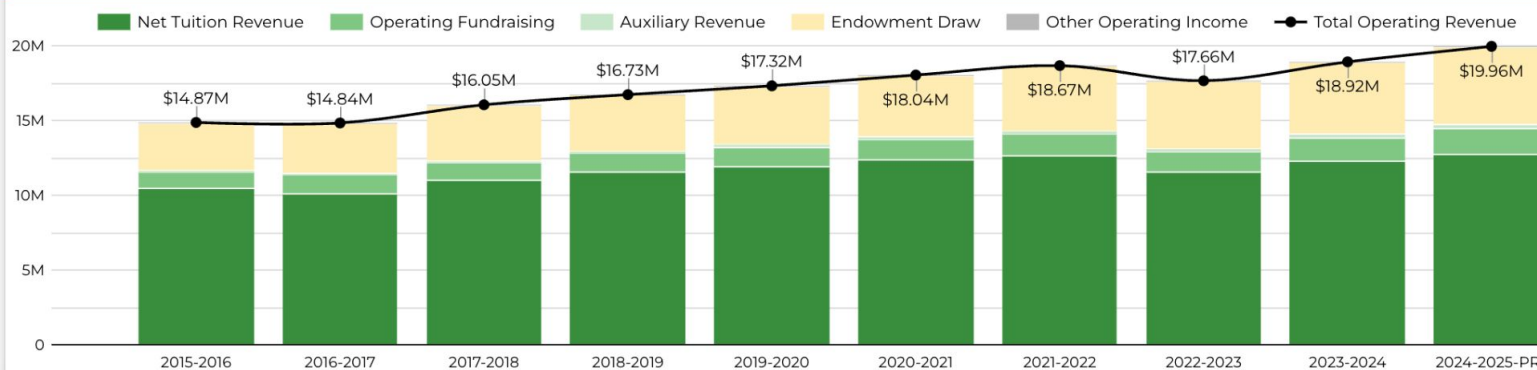
Filter data by:

Year

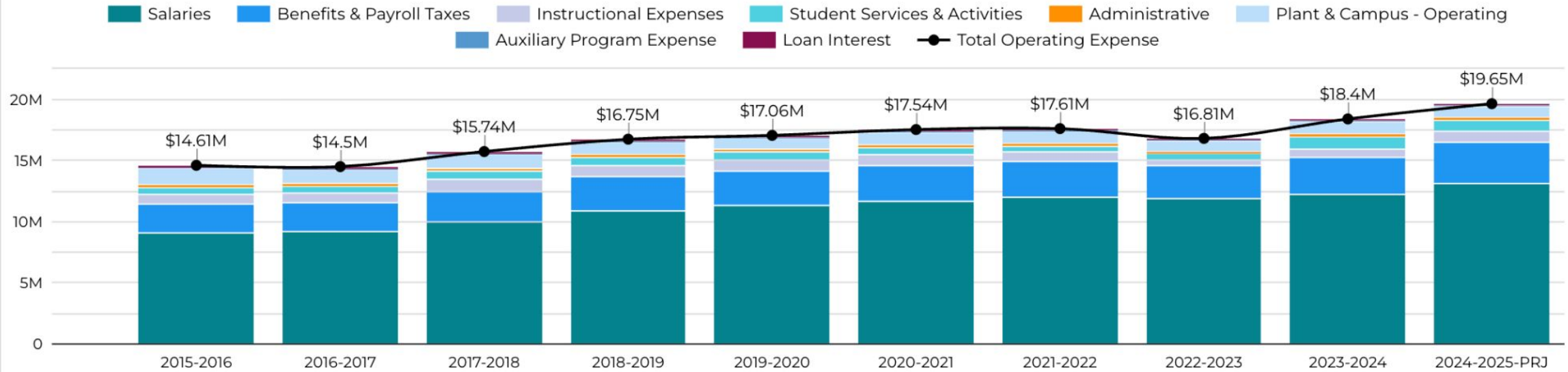
Year-Over-Year Trends in Operating Income



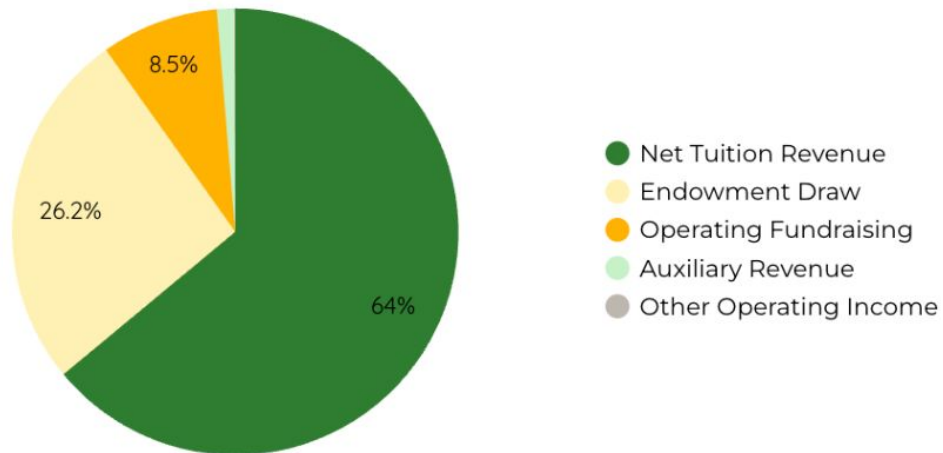
Year-Over-Year Operating Revenue Trends

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& DATA**

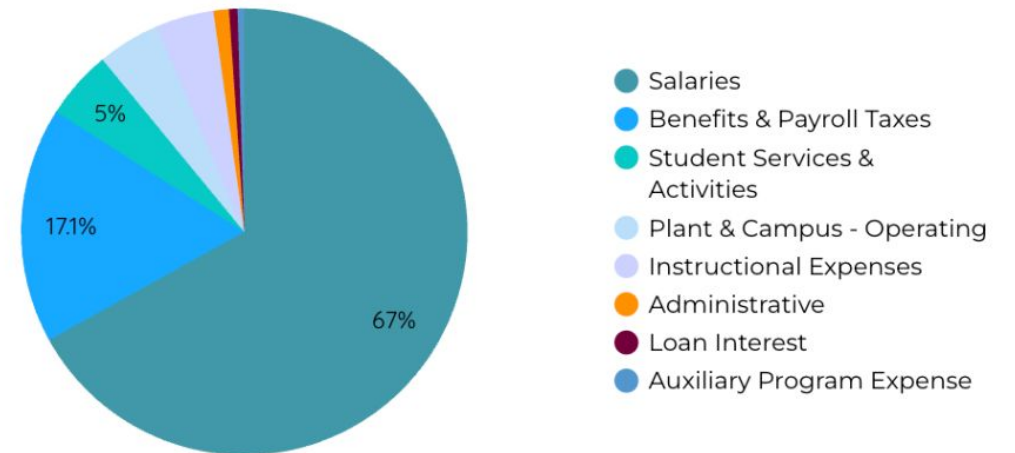
Year-Over-Year Operating Expense Trends



Current Year Operating Revenue Composition



Current Year Operating Expense Composition



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Board of Trustees Dashboard Tuition & Discounting Overview

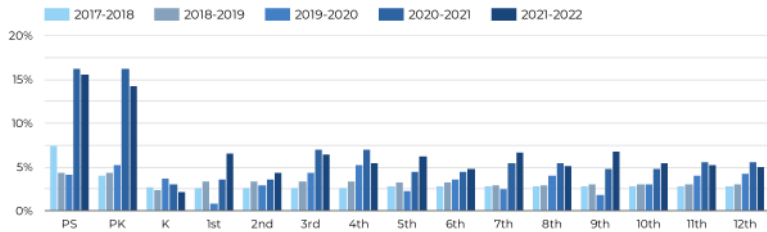
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Grade

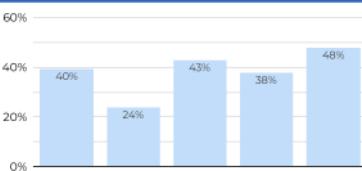
Current Year Tuition Rates

Grade	Tuition	YoY Δ Tuition
12th	\$26,800	5.1%
11th	\$26,800	5.3%
10th	\$26,590	5.52%
9th	\$26,590	6.79%
8th	\$25,500	5.15%
7th	\$25,500	6.69%
6th	\$24,750	4.87%
5th	\$24,750	6.22%
4th	\$24,220	5.53%
3rd	\$24,220	6.46%
2nd	\$23,440	4.41%
1st	\$23,440	6.55%
K	\$20,340	2.21%
PK	\$20,340	14.27%

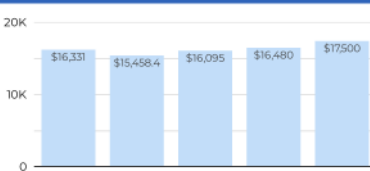
Year-Over-Year Tuition Increases, by Grade



Average Tuition Discount, by Division



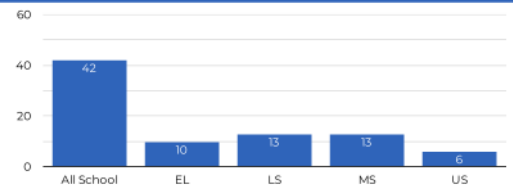
Average Net Tuition Revenue, by Division



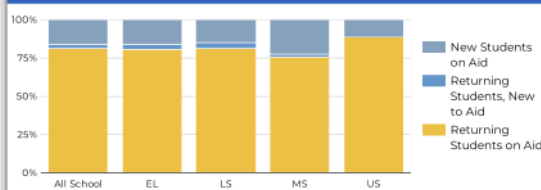
Financial Aid Amount Awarded, by Division



Number of Students on Financial Aid, by Division



Breakdown of Financial Aid Students



Discount Students by Association



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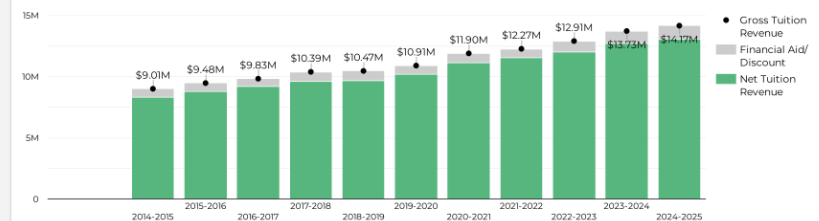
Board of Trustees Dashboard Net Tuition and Discounting

Lost Updated: Jul 29, 2024

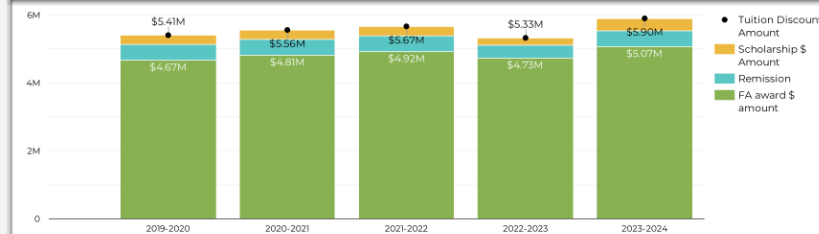
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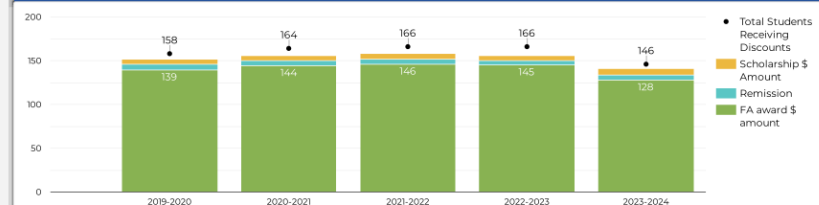
Total Gross and Net Tuition Collected Each School Year



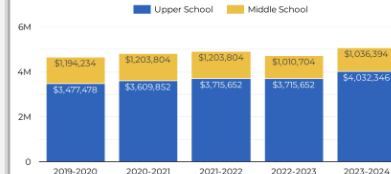
Total Awarded in Tuition Discounts, by Discount Type and School Year



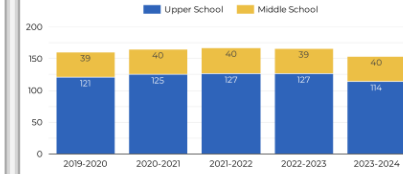
Number of Students with Tuition Discounts, by Discount Type and School Year



Total Awarded Tuition Discounts, by Division



Number of Students with Tuition Discounts, by Division



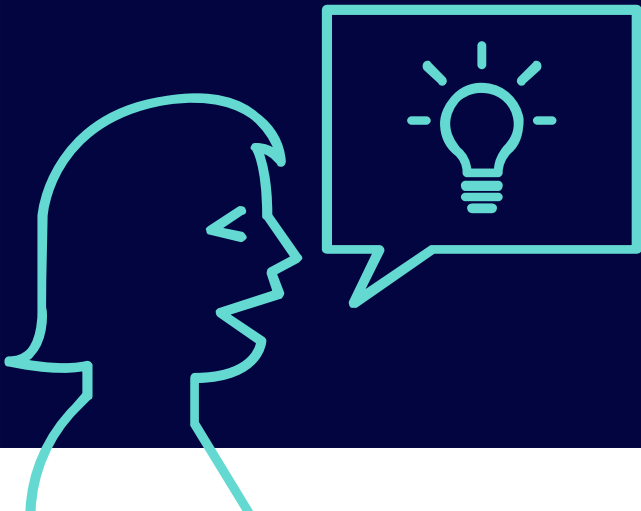
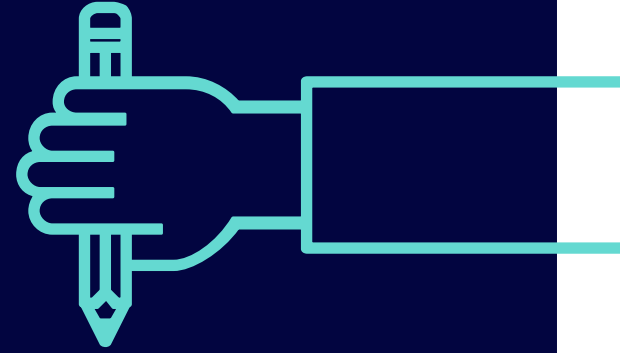
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Mission
& DATA

Head Evaluation Overview



Getting Started

Write down **ONE** adjective that describes your current HOS review process.



Why HOS Assessment Matters

- Ensures the HOS has **support** and board fulfills key responsibility
- Recognizes the importance of **affirmation** and **growth/professional development** for the HOS
- Measures **progress against goals** mutually agreed upon between the HOS and Board
- Provides a critical **feedback loop** between the HOS and the Board
- Likely increases length of the HOS's tenure, creating greater stability for the school



For Assessment to Be Effective:

Feedback:

Positive and constructive
– must rest upon a
foundation of **trust and
open communication**
between the HOS, the
Board Chair and the
Board.

Shared understanding:

- Goals
- How and when goals will be measured
- What evaluation tool will be used
- Success signals
- Frequent updates on progress/ lack thereof
- Agreement on when to pivot



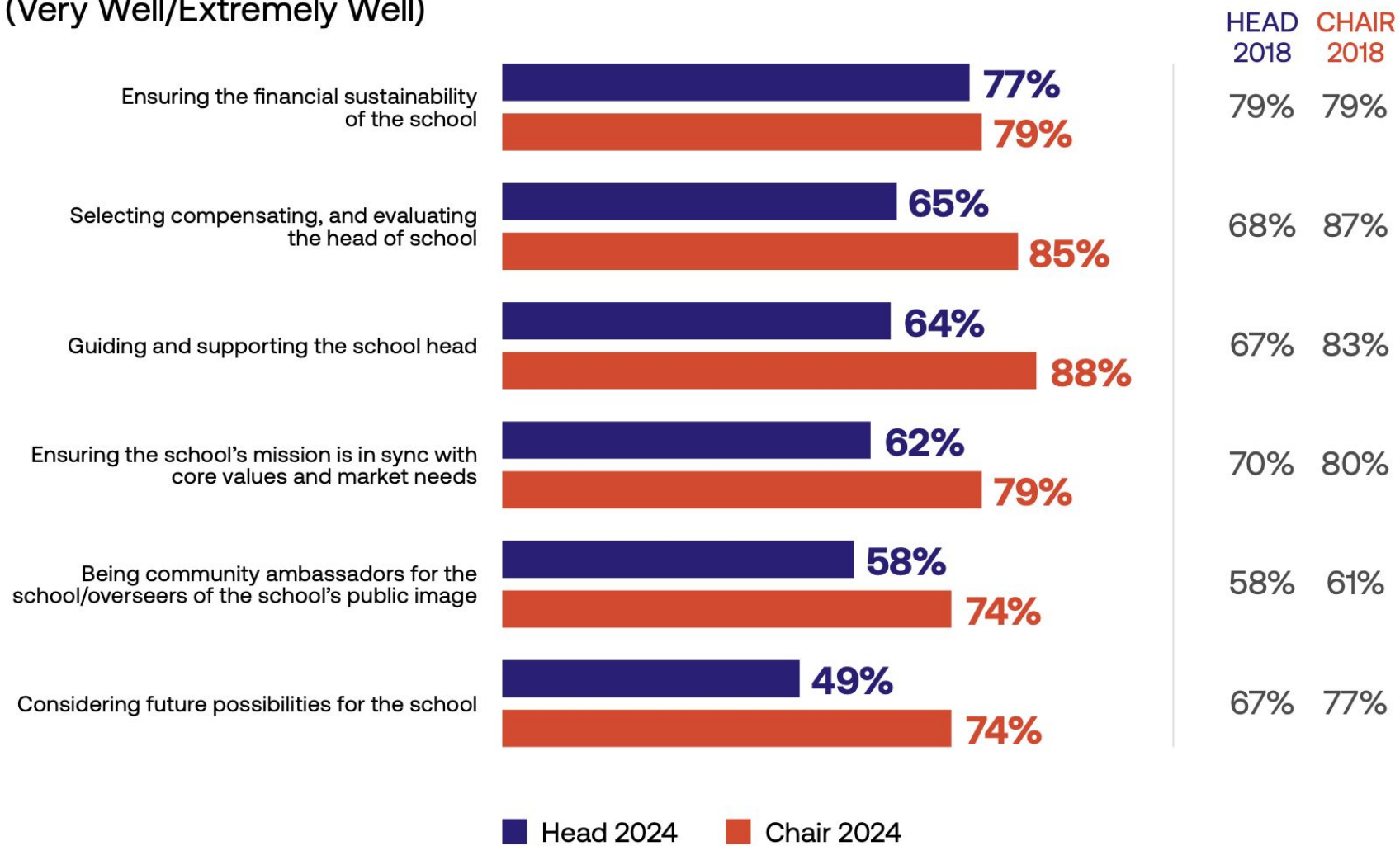
We see a disconnect between what Heads report and Chairs/Board report with regard to establishing annual goals and assessing progress on the goals:

2020 Head Turnover Report: Goals and Assessment

	Head of School	Board Chair	Board Member
Board sets achievable goals for head of school.	77%	95%	90%
Head of school and board collaborate on prioritization of annual goals.	77%	95%	88%
Board provides periodic feedback to head of school on progress in meeting annual goals.	68%	94%	85%
Board gives head of school adequate time to achieve goals.	77%	94%	92%

Based on the same list of roles seen before, please indicate how well you believe your board has performed in each of the following areas:

(Very Well/Extremely Well)



The Question of Support



What Does HOS Support Look Like?

- *What can I do? vs This is what I can do*
- Support looks and feels different for different heads of school
- Communication is key!





Boards Working with and Supporting the HOS

- Provide positive feedback and be a cheerleader in the community
- In private and through appropriate channels, provide constructive feedback when appropriate
- A simple check-in, how's it going, you're doing a great job without any other agenda goes a long way
- So does how can I/we be of assistance
- **FACT:** head tenure is correlated with successful schools, and long-term heads bring stability and more meaningful, lasting improvement

Types of Assessment:

Formative VS Summative

Formative assessment is ongoing throughout the year and helps the HOS and board members better understand where the school is regarding progress towards stated goals and objectives, as well as ways the head can continue to improve.

Summative assessment occurs at the end of the year as the head's yearly evaluation and is an assessment of progress towards the goals that the head and board mutually agreed upon and other areas of performance.

Frequent, Formative Feedback

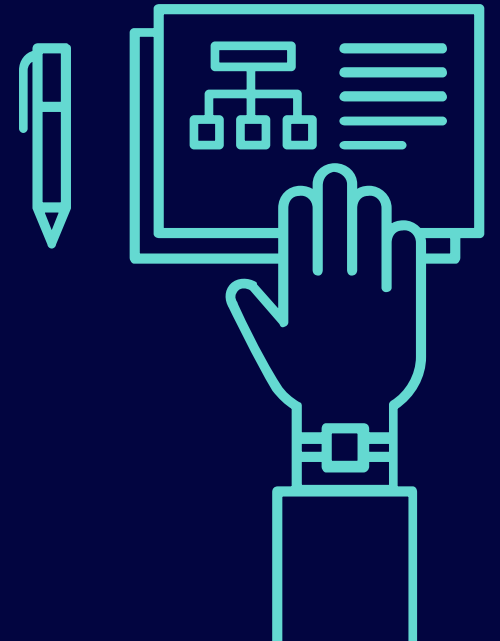
Board Chair and HOS

- Clarity about roles:
 - Head leads the school
 - Chair offers counsel and coaching
- Focus of meetings:
 - Progress towards goals and overall health of the school
 - Celebrate successes
 - Identify challenges
 - Determine when to revisit
 - Agree to pivot

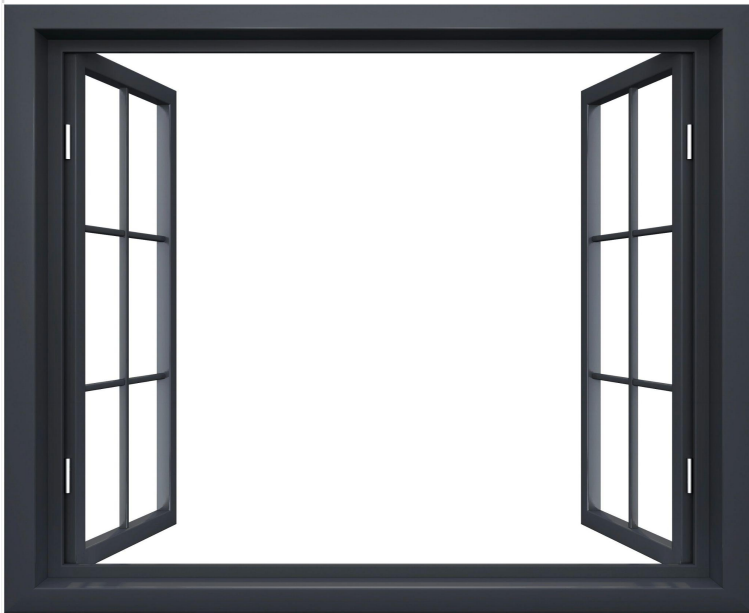
Board and HOS

- Clarity about roles:
 - Head leads the school
 - Board must understand why the school is making the choices it's making
- Focus of Board meetings:
 - Set agendas for a full year
 - HOS updates board on goals so the board understands why and how progress has been made and what challenges exist
 - Board raises questions and offers feedback and guidance

A Quick Word about Ratings:



Humans are bad raters of other humans ...



VS



Idiosyncratic Rater Effect

“Although it is implicitly assumed that the ratings measure the performance of the ratee, in reality most of what is being measured by the ratings is the unique rating tendencies of the rater. Thus, ratings reveal more about the rater than they do about the ratee.”

London, Manuel, editor. *How People Evaluate Others in Organizations*. Psychology Press, 2001.

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Best Practices for Head of School Assessment



Board Chair and HOS should establish clear parameters for their working relationship.



Goal-setting should be collaborative and aligned to the vision, mission, and strategic plan



Clear metrics for assessment should be outlined.



Both formative and summative feedback are provided throughout the year.



Open, transparent, and regular communication is key!

What about 360 Evaluations?

- The responsibility for evaluating the head rests with the board and should not be delegated to stakeholders outside of the board.
- There is a time and a place for utilizing 360's:
 - As a tool for the head's information and professional growth only



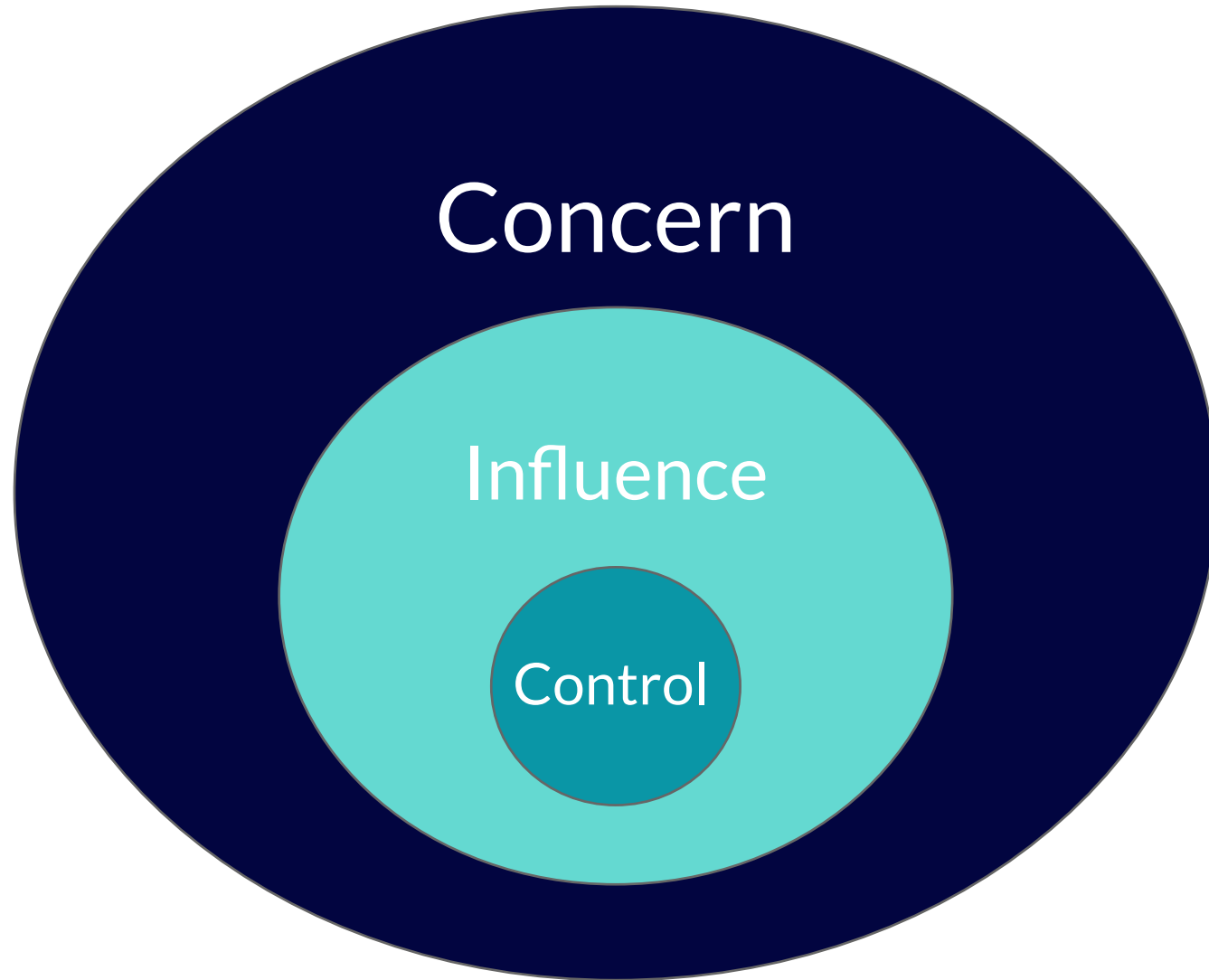
How Might the Broader Impact of the Head's Leadership be Measured?

Net Promoter Score



$$\text{NPS} = (\%) \text{ Promoters} - (\%) \text{ Detractors}$$

The Three Spheres of Influence



Setting Goals & Determining Measurement - Timeline Example

APRIL:

- HOS uses evaluation feedback and the strategic plan to set goals and measurements for the year
- HOS discusses draft goals with board chair/HSEC

MAY:

- HOS fine tunes goals and measurements based on board chair/HSEC feedback
- HOS presents goals and measurements to the full board, gathers questions, and revises

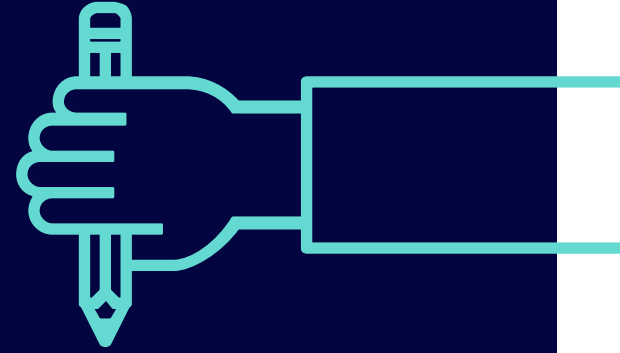
JUNE:

- HOS shares goals and measurements with leadership team so that they may use school wide goals and measurements to set department goals

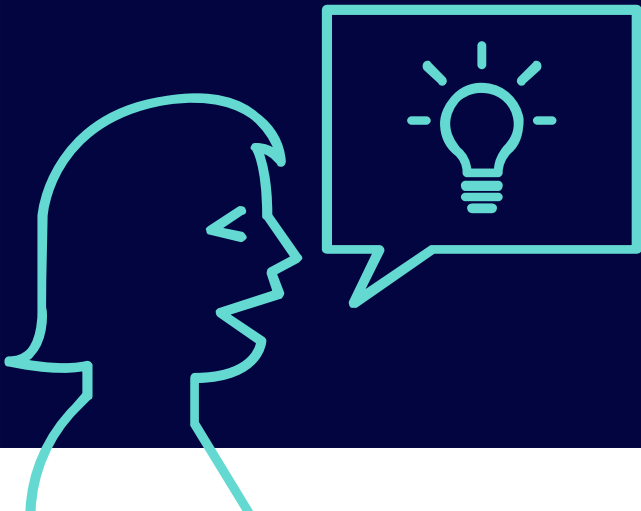


Goal Setting:

- Generally should have between three and five goals
- Goals should come from three primary sources:
 - 1) feedback and areas of improvement noted in the evaluation
 - 2) the strategic plan
 - 3) areas of focus or special attention that are a part of the Head of School's regular responsibilities



Case Studies



Case Study 1: Balancing Strategic Vision with Operational Management

Context:

The Head of School has successfully led a bold strategic plan over the last two years, including a campus renovation and a shift to competency-based education. However, feedback from faculty and staff in the annual climate survey indicates dissatisfaction with communication, decision-making transparency, and daily operations management.

Discussion Prompt:

1. How should the committee weigh long-term strategic accomplishments against short-term operational concerns in the Head's evaluation?
2. Should leadership in visionary work mitigate issues in day-to-day management, or are both equally critical in evaluating overall effectiveness?

Case Study 2: Short-Term Turbulence, Long-Term Vision

Context:

The Head has restructured the administrative team, removing long-standing staff viewed by some as ineffective. This has caused internal unrest and resistance, including faculty resignations. The Head believes the changes are necessary for long-term improvement.

Discussion Prompt:

1. How should short-term disruption factor into a long-term leadership evaluation?
2. What time frame is fair and strategic for judging controversial leadership decisions?
3. How can the evaluation process differentiate between discomfort and dysfunction?

Case Study 3: Mission vs. Metrics

Context:

The Head of School has successfully led a major equity and inclusion initiative that aligns deeply with the school's mission. Faculty morale is high and student engagement is strong. However, academic metrics — including standardized test scores and college admissions results — have declined slightly over the past two years.

Discussion Prompt:

1. How should the committee weigh mission alignment against quantitative academic outcomes?
2. Are current evaluation metrics adequate for capturing transformational leadership?
3. Should the evaluation include both mission impact and measurable performance? If so, how?

Case Study 4: Managing Board-Head Relationship Boundaries

Context:

Several trustees have received direct emails from parents expressing frustration with school discipline policies and claiming the Head is “unresponsive.” Some trustees feel pressure to reflect these concerns in the Head’s evaluation, while others emphasize the importance of maintaining the Head’s authority and independence from individual complaints.

Discussion Prompt:

1. What is the appropriate role of parent feedback in the Head’s evaluation process, and how should the committee distinguish between isolated complaints and systemic issues?
2. How can the committee ensure a fair, professional, and data-informed approach while supporting the Head’s leadership?

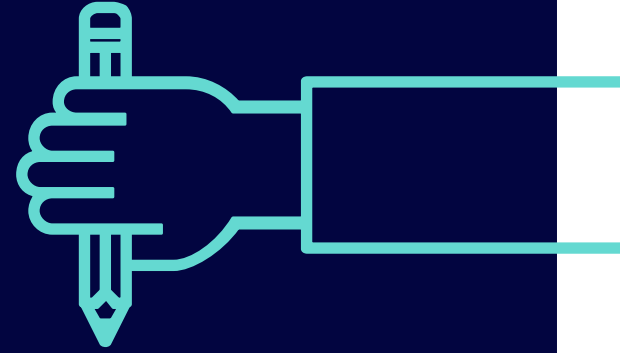
Case Study 5: Balancing Support and Evaluation

Context:

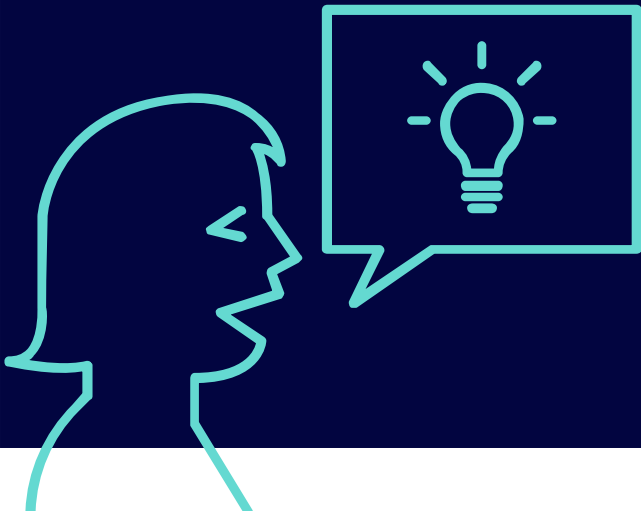
The Head has shared that the evaluation process feels overly judgmental and unclear. Trustees want to ensure accountability but worry that the current process may be harming morale and trust.

Discussion Prompt:

1. How can the committee better balance support and accountability in the evaluation process?
2. What practices could make the evaluation feel more developmental than punitive?
3. Are there structural or relational adjustments that would improve transparency and effectiveness?



Questions & Discussion







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Mission & Data is a firm dedicated to the effectiveness, health, and vitality of educational institutions and other organizations that make the world a better place. We are committed to enhancing mission-driven, data-informed leadership and governance by:

Integrated strategy consulting to promote financial sustainability, improve organizational effectiveness and facilitate organizational transformation.

Developing custom data products, visualizations, and dashboards to highlight progress, identify trends, and leverage actionable insights.

Auditing current practice and analyzing organizational data to recommend process efficiencies and strategic improvements.

Coaching leaders and boards of trustees to enact institutional vision and build a culture of inquiry-based decision making practices.

