

Prepared for Demo for Website 2008

Report Date : April, 2010

Of the 3 questionnaires distributed to your board, 3 were completed. This summary report is designed to guide the board and the head of school through an effective dialogue. The goal of this dialogue is to provide insight into the board's perception of the head's strengths, limitations and overall performance and to foster the growth and development of the head of school and the school. This process is meant to be a learning experience and we believe it is only through discussion of this type that the head of school and their board can chart a course of action and make progress in fulfilling the school's mission.

Averages for all respondents:

Responsibility	Average Score
Section 1: Goals for Head Master	3.35
Section 2: Vision, Mission, and Strategies	2.75
Section 3: Accomplishment of Management Goals	3.82
Section 4: Program Management	2.42
Section 5: Effectiveness in Fundraising and Resource Development	2.67
Section 6: Fiscal Management	3.17
Section 7: Operations Management	3.60
Section 8: The Head of School-Board Partnership	3.50
Section 9: The Board-Staff Relationship	2.50
Section 10: Constituent Relations and Public Image	3.17

Section 1: Goals for Head Master (Average Score: 3.35)

How satisfied are you that the head of school:								
	Head's Score	Average	1 Very Dissatisfied	2 Dissatisfied	3 Satisfied	4 Very Satisfied	Not Sure	Not Applicable
1.1 Your Head of School's annual goals can be entered into this section.	4.00	3.33	0%	0%	67%	33%	0%	0%
1.2 If your HOS did not have goals for the last school year, this section can be omitted from the survey.	4.00	3.00	0%	0%	100%	0%	0%	0%
1.3 Goal 3	3.00	3.67	0%	0%	33%	67%	0%	0%
1.4 Goal 4	4.00	3.33	0%	0%	67%	33%	0%	0%
1.5 Goal 5	4.00	3.67	0%	0%	33%	67%	0%	0%
1.6 Goal 6	3.00	4.00	0%	0%	0%	100%	0%	0%
1.7 Goal 7	4.00	3.50	0%	0%	33%	33%	33%	0%
1.8 Goal 8	4.00	3.00	0%	0%	67%	0%	33%	0%
1.9 Goal 9	3.00	3.00	0%	0%	67%	0%	0%	33%
1.10 Goal 10	4.00	3.00	0%	0%	67%	0%	0%	33%

Do you have additional comments on specific goal areas?
Please note that all comments will be included in the summary report as they were entered.

- All comments remain completely anonymous.
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Section 2: Vision, Mission, and Strategies (Average Score: 2.75)

The head of school's role has both strategic and operational components. Working with the board, the head of school must develop a shared vision for the future of the organization, build understanding around the current mission, and develop appropriate goals and strategies to advance that mission. In addition, the head is able to point to concrete examples of the school's mission being fulfilled in the policies and programs of the school.

How satisfied are you that the head of school:								
	Head's Score	Average	1 Very Dissatisfied	2 Dissatisfied	3 Satisfied	4 Very Satisfied	Not Sure	Not Applicable
2.1 has worked with the board to develop a clear vision for the school, and understands his or her own leadership role?	4.00	2.00	33%	0%	33%	0%	33%	0%
2.2 has worked with the board to translate the school's mission into realistic goals and objectives?	4.00	3.00	0%	33%	33%	33%	0%	0%
2.3 has worked with the board and staff to create an effective process for long-range or strategic planning for the school?	3.00	3.00	0%	0%	100%	0%	0%	0%
2.4 has a sense of what must change and what must remain the same in order to accomplish the school's mission and realize its vision?	4.00	3.00	0%	33%	33%	33%	0%	0%

What are the major strengths of the head of school in this area?
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How can the head of school improve in this area?

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Section 3: Accomplishment of Management Goals (Average Score: 3.82)

Working with the board, the head of school establishes annual operational goals that support the strategic plan. The head of school is responsible for leading the staff in the implementation of the strategic plan and any annual plan.

How satisfied are you that the head of school:								
	Head's Score	Average	1 Very Dissatisfied	2 Dissatisfied	3 Satisfied	4 Very Satisfied	Not Sure	Not Applicable
3.1 selects and cultivates qualified senior staff, models effective behaviors and skills, and builds morale among staff and volunteers?	4.00	3.67	0%	0%	33%	67%	0%	0%
3.2 ensures that there are appropriate systems in place to facilitate the day-to-day operations of the school in the areas of:			0%	0%	0%	0%	0%	0%
a. development and delivery of programs?	3.00	3.67	0%	0%	33%	67%	0%	0%
b. admissions, marketing, and outreach?	4.00	3.67	0%	0%	33%	67%	0%	0%
c. policy development?	4.00	3.67	0%	0%	33%	67%	0%	0%
d. administration and operations?	3.00	3.67	0%	0%	33%	67%	0%	0%
e. fundraising and resource development?	4.00	3.67	0%	0%	33%	67%	0%	0%
3.3 appropriately and effectively communicates with:			0%	0%	0%	0%	0%	0%
a. parents or guardians of current students?	4.00	3.67	0%	0%	33%	67%	0%	0%
b. the board?	3.00	4.00	0%	0%	0%	100%	0%	0%
c. staff?	4.00	4.00	0%	0%	0%	100%	0%	0%
d. parents or guardians of prospective students?	4.00	4.00	0%	0%	0%	100%	0%	0%
e. alumni?	3.00	4.00	0%	0%	0%	100%	0%	0%
f. current and potential donors of the school?	4.00	4.00	0%	0%	0%	100%	0%	0%
g. media and others in the community?	4.00	4.00	0%	0%	0%	100%	0%	0%

What are the major strengths of the head of school in this area?

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Section 4: Program Management (Average Score: 2.42)

A school carries out its mission by offering specific programs and services. The head demonstrates this oversight through appropriate delegation of responsibilities. This requires a thorough knowledge of the school's mission area as well as an understanding of technical, operational, and ethical issues.

How satisfied are you that the head of school:								
	Head's Score	Average	1 Very Dissatisfied	2 Dissatisfied	3 Satisfied	4 Very Satisfied	Not Sure	Not Applicable
4.1 demonstrates substantive knowledge regarding the organization's programs and services?	3.00	2.33	33%	33%	0%	33%	0%	0%
4.2 works with the board to develop appropriate policies to ensure the efficiency and effectiveness of programs?	4.00	2.33	33%	0%	67%	0%	0%	0%
4.3 sets high standards of quality for the school's programs?	4.00	3.00	0%	33%	33%	33%	0%	0%
4.4 recommends new programs and the modification or discontinuance of current programs, as appropriate, to the board?	3.00	2.00	0%	67%	0%	0%	33%	0%

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How can the head of school improve in this area?

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Section 5: Effectiveness in Fundraising and Resource Development (Average Score: 2.67)

The head is able to provide substantial leadership in this area by being able to clearly articulate the school's needs. The head of school and board use their combined strengths, knowledge, and relationships to help the school achieve its objectives.

How satisfied are you that the head of school:								
	Head's Score	Average	1 Very Dissatisfied	2 Dissatisfied	3 Satisfied	4 Very Satisfied	Not Sure	Not Applicable
5.1 has a clear understanding of the current and future financial resources needed to realize the school's mission?	4.00	2.67	0%	33%	67%	0%	0%	0%
5.2 works in concert with the board and development staff to implement a fundraising program that meets the goals established for the school?	4.00	2.67	0%	33%	67%	0%	0%	0%
5.3 is innovative in the creation of partnerships with businesses or other institutions that contribute to the school's resources?	3.00	2.33	33%	0%	67%	0%	0%	0%
5.4 guides revenue-generating activities in order to provide adequate income to the school?	4.00	2.67	0%	33%	67%	0%	0%	0%
5.5 is an effective fundraiser, working well with staff, donors, and board members to secure adequate income and strong personal commitments from those who have an interest in the school?	4.00	3.00	0%	0%	100%	0%	0%	0%

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How can the head of school improve in this area?

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Section 6: Fiscal Management (Average Score: 3.17)

Ensuring that income is managed wisely is especially important for an independent school operating in the public trust. It is the role of the head of school to see that solid planning and budgeting systems are in place, and that the school's goals and strategic plan serve as the basis for sound financial planning. In addition, it is the head of school's responsibility to ensure that qualified staff is hired to accurately monitor, assess, and manage the financial health of the school.

How satisfied are you that the head of school:								
	Head's Score	Average	1 Very Dissatisfied	2 Dissatisfied	3 Satisfied	4 Very Satisfied	Not Sure	Not Applicable
6.1 is knowledgeable regarding financial planning, budgeting, and management of the school's investments and endowment, and understands the place of each in the school's overall financial picture?	3.00	3.33	0%	0%	67%	33%	0%	0%
6.2 has established a system linking strategic and operational planning with the school's budgeting process?	4.00	3.00	0%	0%	100%	0%	0%	0%
6.3 presents financial reports to the board on a regular basis and submits an annual budget for board review, revision, and approval?	4.00	3.33	0%	0%	67%	33%	0%	0%
6.4 ensures that a clear and accurate accounting system is maintained, allowing the board to monitor the school's finances and operations in relation to the approved budget, and to make informed financial decisions?	3.00	3.00	0%	0%	100%	0%	0%	0%

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How can the head of school improve in this area?

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Section 7: Operations Management (Average Score: 3.60)

The head of school is responsible for day-to-day management. The head of school works with staff to develop, maintain, and use the systems and resources that facilitate the effective operation of the school. This includes timely and appropriate delegation of responsibilities, as well as annual performance reviews for all key reports.

How satisfied are you that the head of school:								
	Head's Score	Average	1 Very Dissatisfied	2 Dissatisfied	3 Satisfied	4 Very Satisfied	Not Sure	Not Applicable
7.1 is knowledgeable regarding the operations of an effective office environment?	4.00	3.33	0%	0%	67%	33%	0%	0%
7.2 has ensured that the school has in place:			0%	0%	0%	0%	0%	0%
a. sound risk-management policies, including adequate insurance coverage?	4.00	3.67	0%	0%	33%	67%	0%	0%
b. appropriate personnel policies and systems for staffing?	3.00	3.67	0%	0%	33%	67%	0%	0%
c. plans for the appropriate use of technology and technological systems?	4.00	3.67	0%	0%	33%	67%	0%	0%
7.3 establishes practices to comply with all NAIS, legal and regulatory requirements?	4.00	3.67	0%	0%	33%	67%	0%	0%

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How can the head of school improve in this area?

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Section 8: The Head of School-Board Partnership (Average Score: 3.50)

The head of school and the board must work together as partners. Each arm of leadership draws upon its own unique strengths and abilities. The head of school and the board have joint responsibility for developing and maintaining a strong and open working relationship and a system for sharing information. The board is responsible for creating a written job description for the head of school that is clear and agreed to by all parties.

How satisfied are you that the head of school:								
	Head's Score	Average	1 Very Dissatisfied	2 Dissatisfied	3 Satisfied	4 Very Satisfied	Not Sure	Not Applicable
8.1 is clear about the differences between his or her role and that of the board?	3.00	3.00	0%	33%	0%	33%	33%	0%
8.2 is an effective partner with the board in leading the school?	4.00	3.67	0%	0%	33%	67%	0%	0%
8.3 has been delegated the authority necessary to manage the school effectively?	4.00	3.33	0%	0%	67%	33%	0%	0%
8.4 raises issues and questions and provides adequate information to inform board discussions?	3.00	4.00	0%	0%	0%	100%	0%	0%
8.5 receives an annual review in a timely and thoughtful way that articulates specific strengths and areas for improvement?	4.00	3.50	0%	0%	33%	33%	0%	33%

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How can the head of school improve in this area?

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Section 9: The Board-Staff Relationship (Average Score: 2.50)

Because many organizational issues require a partnership of board and staff to be addressed effectively, it is important that the board, head of school, and staff members assigned to assist the board members in carrying out its work have a strong and open working relationship.

How satisfied are you that the head of school:								
	Head's Score	Average	1 Very Dissatisfied	2 Dissatisfied	3 Satisfied	4 Very Satisfied	Not Sure	Not Applicable
9.1 has established appropriate systems for dialogue and communication between the board and staff to ensure that the board maintains a good knowledge of the school?	4.00	2.33	0%	67%	33%	0%	0%	0%
9.2 has a collegial working relationship with the staff and the board?	3.00	2.67	0%	33%	67%	0%	0%	0%

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How can the head of school improve in this area?

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Section 10: Constituent Relations and Public Image (Average Score: 3.17)

The head of school and board members are key players in establishing and maintaining positive relationships with the many constituencies that support the work of the school. The head serves as the school's chief spokesperson and public ambassador.

How satisfied are you that the head of school:								
	Head's Score	Average	1 Very Dissatisfied	2 Dissatisfied	3 Satisfied	4 Very Satisfied	Not Sure	Not Applicable
10.1 maintains a positive professional reputation in the local community and is a good ambassador for the school?	4.00	2.67	0%	33%	67%	0%	0%	0%
10.2 cultivates effective relationships with:			0%	0%	0%	0%	0%	0%
a. community and business leaders?	4.00	3.33	0%	0%	67%	33%	0%	0%
b. constituents?	3.00	3.00	0%	0%	100%	0%	0%	0%
c. public officials?	4.00	3.33	0%	0%	67%	33%	0%	0%
d. relevant professional organizations?	4.00	3.00	0%	0%	100%	0%	0%	0%
e. potential funders?	3.00	3.67	0%	0%	33%	67%	0%	0%
f. parents?	4.00	3.33	0%	0%	67%	33%	0%	0%
g. students?	4.00	3.67	0%	0%	33%	67%	0%	0%
h. faculty and staff?	3.00	3.00	0%	0%	100%	0%	0%	0%
i. alumni?	4.00	3.33	0%	0%	67%	33%	0%	0%
10.3 is an articulate and knowledgeable spokesperson for the school?	4.00	3.00	0%	0%	100%	0%	0%	0%
10.4 is well regarded by his or her professional peers in the independent school world?	3.00	2.67	33%	0%	33%	33%	0%	0%

What are the major strengths of the head of school in this area?

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How can the head of school improve in this area?

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Open-Ended Questions:

1. What are the three major strengths of the head of school?

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2. What are some limitations in the head of school's performance?

- Comments will appear as bullet points in random order.
- Participant comments appear exactly as entered in the survey.
- All comments remain completely anonymous.

3. What have been the most significant achievements of the head of school over the past year?

- All comments remain completely anonymous.
- Participant comments appear exactly as entered in the survey.
- Comments will appear as bullet points in random order.

4. What external factors have influenced the head of school's performance?

- Participant comments appear exactly as entered in the survey.
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5. In the past year, what difficult issues have faced the school, and how did the head of school bring them to resolution?

- All comments remain completely anonymous.
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- Comments will appear as bullet points in random order.

6. Have any legal or ethical issues arisen with regard to the operations of the school? How were these brought to successful resolution?

- Participant comments appear exactly as entered in the survey.
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- All comments remain completely anonymous.

7. What are areas in which the board could provide better support to the head of school?

- Participant comments appear exactly as entered in the survey.
- All comments remain completely anonymous.
- Comments will appear as bullet points in random order.

8. What should the organizational goals be for the head of school for the coming year?

- Participant comments appear exactly as entered in the survey.
- All comments remain completely anonymous.

- Comments will appear as bullet points in random order.

9. What should be the personal development goals for the head of school for the coming year?

- All comments remain completely anonymous.
- Comments will appear as bullet points in random order.
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10. Additional comments:

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