



► PRESERVING THE HERITAGE



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# Trustee *focus*

ADDRESSING KEY ISSUES FOR CHRISTIAN SCHOOL TRUSTEES AND PLANTING THE SEEDS FOR A SECURE FUTURE.

**The Christian School's Greatest Need.** This is part three of a three-part series on developing the school's leadership team. Part one focused on stability in leadership and part two on the value of board/CEO evaluation.

## CEO Evaluation: Policy, Philosophy, & Procedure

By John Schimmer, Ed.D.

In parts 1 and 2 of this series I endeavored to build a case for the absolute necessity of annually evaluating your chief school officer (CEO). Part 3 will now focus on developing a board policy and philosophy to drive this program and information to help you get started. When done correctly, the program will forge a relationship of trust and camaraderie essential to a strong leadership team.

The goal of every school board must be to hire well, mentor and grow the leadership, and seek to retain the CEO for the long haul (10-15 years).

### Getting Started

The first step is to write a board governance policy which mandates an annual evaluation and protects the integrity of purpose and procedures. A good policy will include the following points:

- The CEO evaluation is a board responsibility and cannot be delegated to non-board members,
- It will be done at least annually, in the month of January or February (assuming the board does so only once a year),
- The CEO will be involved with the board in developing the process and instrument (annually),
- The board will provide sufficient resources to assist the CEO in accomplishing the recommendations,
- The board will present its report to the CEO orally and in writing, and guarantee the confidentiality of all information.

### Developing Your Philosophy

Although school literature uses the term "evaluate," a Christian school philosophy statement should convey



that the assessment process is for the purpose of mentoring, growing, and empowering the CEO. Scripture clearly teaches that leaders who oversee the work of others are to be as shepherds, caring for and guarding the sheep (*John 21:16; Acts 20:28; 1 Peter 5:2*).

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Any evaluation within the context of a biblically-based program or ministry should clearly follow the principles of Scripture. God's Word is the plumb-line by which we measure everything we say and do.

The board must search the Scriptures to select and record in the philosophy statement those verses/passages which will form the foundation upon which the process, deliberations, conclusions, and reports will be based. ([Click here](#) for a few examples of what the Bible has to say about the leader's relationships) Furthermore, I recommend that every year the board chair lead the collective board in the study of these passages, and a recommitment to the board's biblical philosophy before beginning the evaluation process.

The Chair must monitor the evaluation process to be sure the board's philosophy and biblical commitment is meticulously followed.

### Constructing Your Process

Preparations for the next evaluation cycle should begin this summer. Af-

ter a careful review of the school's mission and vision statements, the results of the most recent parent satisfaction survey, and the progress made this past year on the board adopted strategic plan, the board and CEO should identify a set of priorities for the next school year, specifically those which directly involve the CEO. This is especially important if this will be the first time the board has committed to the new CEO evaluation policy. The board and CEO will agree on three to five quantifiable priorities which will become the basis for the annual evaluation. (More than five would surely sabotage the goal of growing the CEO. You may need to select fewer priorities if the school is anticipating an accreditation visit next year.)

Although evaluation is the responsibility of the full board, the Chair will appoint a three-person CEO Evaluation Study Committee. I like the committee member qualifications reported in the newsletter of Independent School Management (ism). Members should have had successful management experience, a proclivity for thinking strategically, a reputation of supportive, positive reinforcing behavior, and absolutely no special or private agendas.

There is some debate as to whether the board chair should serve on this committee. I vote yes. The Chair, having worked closely with the CEO,

knows best the CEO's accomplishments, strengths, and weaknesses.

One of the first responsibilities of the committee is to engage the assistance of the CEO in designing the evaluation instrument and submitting it for board approval. The fall months are spent collecting, evaluating, and assembling pertinent information about the CEO's strengths and areas where improvement may be needed. By December they must

be ready to report their conclusions to the board. Only the full board decides what should be included in their report to the CEO. (For boards going through this process the first time, I recommend using the template published by ACSI—see the reference below). The final draft must represent the **one voice** of the board. There are no individual voices.

Writing the report is a very delicate task. It must be carefully worded, positive in nature, encouraging rather than critical, and empowering. The recipient will weigh every word. Remember, you are not grading or producing a report card, but rather mentoring and growing the most important person in the school. The report must not be written in haste, neither should it be a long drawn out process. Every recommendation must be reasonable and doable. The report should be succinct. Choose the four or five most salient recommendations, those which can be accomplished in the next twelve months. Though the immediate purpose is to grow the CEO, the ultimate goal is to make the school better. Both objectives must guide the preparation of the final report.

**The greatest need of the Christian school** is not money, though most schools would welcome a healthy endowment. The greatest need is the long-term retention of the school Head. Strong schools have a stable staff led by a competent, experienced, godly CEO, who is loved and nurtured by a caring board of trustees.

For further study, I recommend the following resources: *Board Evaluation of the Chief Education Officer in the Christian School*, (Purposeful Design Publications); *Evaluating the Performance of Trustees and School Heads*, (National Association of Independent Schools); and *The 'Strategic' Board of Trustees: A Compendium of Ideas & Perspectives Articles*, (Independent School Management).

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