

How the ESAT System Changed Our Culture

In the fall of 2006, Jonathan Schick conducted Trustee Training for my Board. I had asked him specifically to do it because I was fascinated with a head evaluation tool that he had introduced at one of the SAES Head's Retreats in New Braunfels. His *Six Principles of Successful Board/Head Partnerships* was very well received by both new Trustees and those who were in the second or third year of their term. He included at that training a brief overview of his SPAN Navigation/Appraisal tool and how an Executive Support and Appraisal Team might work for us.

We were committed to implementing his 6 principles that school year, and setting attainable goals for the Board, but also vowed to take a closer look at the part on head evaluation. Consequently, we invited him back in the fall of 2007 for a review of his principals and a discussion on how well we thought we had done using his suggestions. We had done well, but decided that this next year in addition to Board goals, each Trustee would also set a personal goal to "stretch themselves" to a higher level of commitment and/or expertise. And this time, he trained us in how best to use his appraisal tool.

Two Trustees, my current Board President (Mari) who will serve in this role again next year and my past Board President (Carolyn) who was supposed to rotate off, but had agreed to finish out the one year remaining on someone else's term, volunteered to serve on my Executive Support and Appraisal Team. I was delighted – these are two people that I knew had the time and the desire to do this job well. We asked a former Trustee (Amanda), whose three children had already outgrown our school, to serve on it also. I knew that without question I could trust Mari, Carolyn and Amanda to be active listeners who would hold in confidence *all* that I had to say, and would not be judgmental when I revealed what I thought were my areas of weakness. I truly needed them and I had to be able to be completely honest with them; after all, this was not just a group who was going to evaluate my performance. They were also charged with supporting me in good times and in bad.

We began by going over the directions for how to use the tool and then set a date for the four of us to get back together. It was slowly becoming clear that *I* was going to have to invest more time in this process than I ever had before. Wasn't evaluating me *their* job? Shouldn't *they* be the ones working on it? Wasn't *I* supposed to be busy handling the day to day operations of the school? In the past, Trustees got together as a large group in March to discuss how well or poorly the year had gone, with each contributing something. Later, one of the Trustees transcribed the discussion, placing the comments under a variety of categories and then distributed a printed copy for all the Trustees to review. They came back together in April to determine which statements actually warranted further discussion and which should just be dropped. An evaluation of me was written, and one or two Trustees shared the information with me in June. And while the evaluation was generally complimentary and included suggestions for improvement, I never knew in August what they were going to base my evaluation on in March. But this was exactly why I wanted to use Jonathan's tool.

And so yes, completing the Pre-Appraisal and Navigation sections required more time and effort on my part than I *ever* first imagined, but it was an invigorating process. I used our Strategic Plan for guidance and then in the end, wrote my three goals; the steps with a timeline; and the

criteria to be used to determine whether the goals had been met. Mari, Carolyn, Amanda and I got back together and discussed *every* page and *every* part of the process – I *wanted* them to know what I was passionate about, what I thought my job was, what was of significant importance to me, what I would like to see improvement in, and what I was honestly interested in doing. It was a lively conversation and I shared with them my hopes and dreams in a way that previously, I had only shared with my husband and my two best friends. This committee now knew what frightened me, what excited me, what was difficult for me, what was easy for me. And, they understood better how goal driven I honestly am; how important it is to me to do my job well; how hard it is for me to stop working at the end of the day when there is still much to be done.

We have met formally and informally a number of times this year. I know that their guidance is absolutely necessary if I am to reach my three goals and that their support is critical to my emotional and physical health. Although the other Trustees are no longer a part of my evaluation, they trust the Executive Support and Appraisal Team to keep me on task and that the team's evaluation of my performance as Head this year is one that they can *all* endorse. And for the first time in my eight years as Head of this school, I have had the opportunity to know, *in advance*, what my evaluation would be based on because I had the power to choose what it would be based on! And although everything this year has not gone perfectly, I know that this process works and that I did indeed meet my goals. And yes, I look forward to using the tool again next year...thanks be to God.

Oh, and not only did I get a substantial raise for next year, but *also* the largest merit bonus that I have ever received. Thanks, Jonathan.

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