



Who Should Read

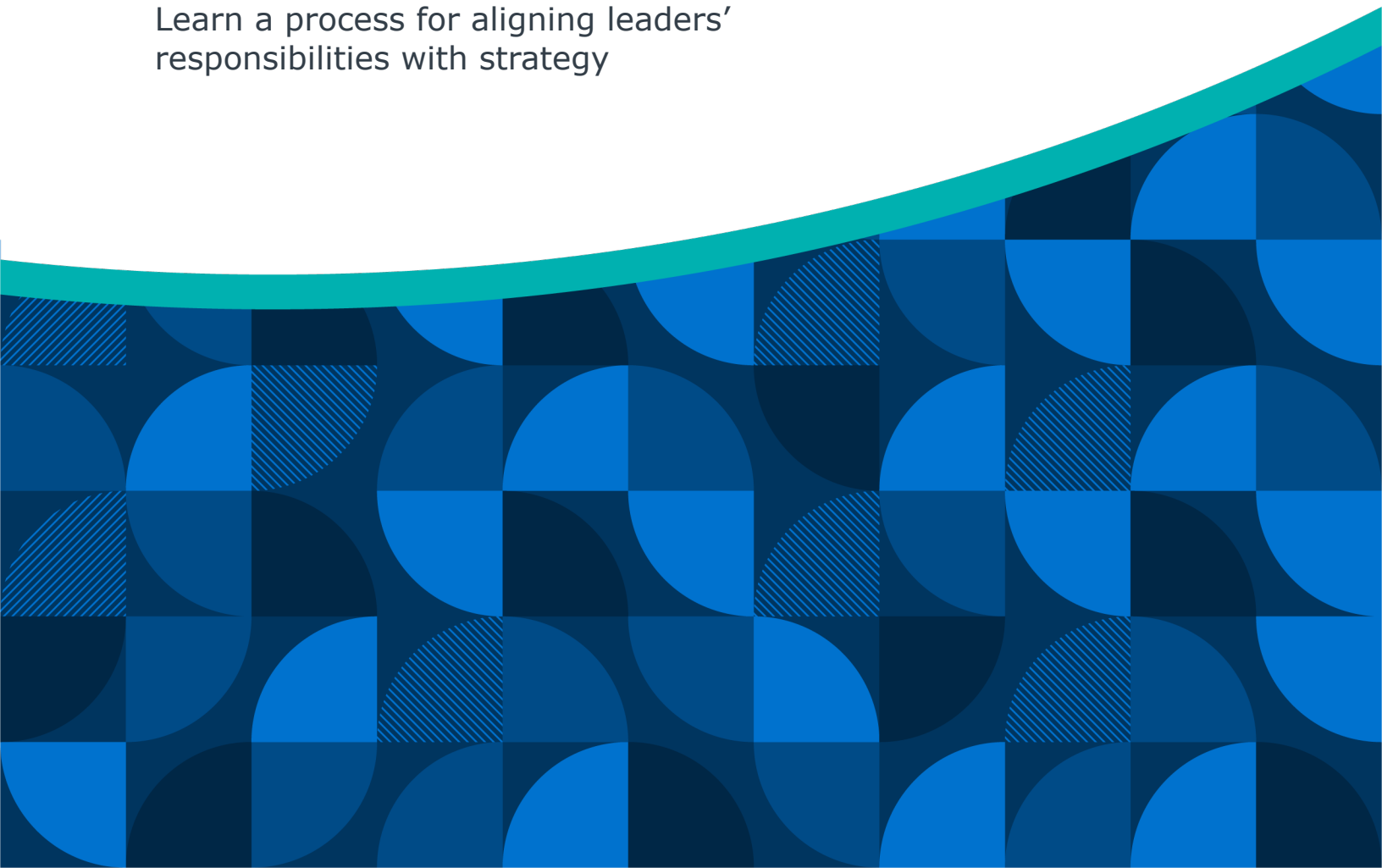
Heads of School

WORKBOOK

Leadership Team Role Reviews

Independent School Executive Forum

Learn a process for aligning leaders' responsibilities with strategy



Independent School Executive Forum

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Introduction: Conducting Role Reviews

Regularly reviewing each senior leader's role helps ensure that their responsibilities and tasks are aligned with the school's strategic priorities and helps ensure that each leader's responsibilities and tasks are clearly differentiated from one another. If roles are not reviewed regularly, then strategic priorities may not be accomplished, ownership of strategic priorities may overlap too much or not enough, and leaders may focus their time on tasks outside of their primary responsibilities. Additionally, as a school's strategic priorities change, it is important that leaders can adjust, change, and expand their responsibilities to match what the school needs, while ensuring role workloads are equitable.

To determine if everyone's role on your leadership team is aligned with your school's strategy, we recommend reviewing each senior leader's role on an annual basis, such as during an employee's annual performance review, in partnership with your Director of HR (if you have one). Below, we have outlined a process for reviewing senior leaders' roles.



Role Review Process

- 1 Head of School:** Share the purpose of the role review, explaining the 'why' behind the process, with senior leaders. Answer any questions.
- 2 Director of HR:** Gather internal data about each role. Consider the following sources for data collection:
 - Current job description and outcomes
 - Current school strategic plan or list of strategic priorities
 - Role Review Self-Assessment (see page 4)
 - Interview(s) with the job holder or previous job holder, with predetermined questions (see page 5)
 - Open-ended survey for the job holder or previous job holder to complete about the job (see page 5)
 - Work diaries or logs, including calendars, to examine how job holders spend their time
- 3 Director of HR:** Gather external data about this type of role through researching a variety of similar, detailed job descriptions from your other independent schools. Connect with EAB if you would like us to collect job descriptions for you.
- 4 Head of School and Director of HR:** Analyze all the data you've gathered to determine:
 - If the job descriptions and outcomes should be updated to align with strategic priorities
 - If leaders' accounts of their roles align with stated job descriptions and outcomes
 - If the job descriptions and outcomes of different leaders overlap too much
 - If job responsibilities and workload are distributed equitably amongst leaders
 - If there is a leader(s) spearheading each strategic priority, and if not, who should spearhead the priority
- 5 Head of School:** Update and share the draft of the new job description and outcomes with the person currently in the role to gather their feedback and come to an agreement on any changes. The description and outcomes should clearly connect to strategic priorities.
- 6 Head of School and Director of HR:** Finalize and share the new job description with the person currently in the role. Continue to update job responsibilities to align with strategy as needed.

After reviewing the information gathered for a role review, anyone within your school should have an accurate understanding of what a person in the stated role does, and how the role connects to the school's strategy.

Please note: Components of this process are similar to job analyses that HR often conducts. Job analyses are used to pinpoint the responsibilities, tasks, skills and competencies, goals, and working conditions required for a particular job. Job analyses are helpful for writing job descriptions, transitioning new employees into their roles, and supporting employees' professional growth.

Exercise #2: Role Review Interviews

Instructions

To help you conduct a role review, ask your Director of HR to interview each of your senior leaders to discuss the details of their job. You and your Director of HR should create a standardized set of around 12-15 questions in total. Below are sample questions that could be used. The questions should focus on learning about each leader's tasks and responsibilities.

If your Director of HR does not have time to conduct interviews (or if you do not have a Director of HR), the questions could also be sent as a survey. Please ensure that each interviewee has a copy of their current job description to review before the interview or before taking the survey.

Example Open-Ended Questions for Job Holders

General Questions

- ▶ How would you describe your job in 2-3 sentences to someone not familiar with the role?
- ▶ How well does your current job description reflect the work you are doing?
- ▶ How has your role evolved since you started?

Workload Questions

- ▶ How many total hours do you work on average each week? Do these hours fluctuate each week? Have these hours changed from this year to last year?
- ▶ How do you feel about the current level of work that you have in your job?
- ▶ How do you think your workload and working hours compare to other people on the leadership team?

Job Responsibilities and Strategic Priorities Questions

- ▶ What are some responsibilities you have held over the past year that do not align with the current job description and/or job outcomes?
- ▶ What responsibilities listed in your job description have you not performed in the past year? Do you think these responsibilities still belong under your role?
- ▶ How do you see your role connecting to the school's strategic priorities? Are there ways that you think that your role could align more closely with the school's strategic priorities?
- ▶ Are there other leaders spearheading strategic priorities that you think align more with your role at the school? Why?
- ▶ Are there strategic priorities that you are spearheading that you think another leader should be spearheading instead? Why?
- ▶ How often do you review how you are spending your time to ensure you are focused on strategic priorities? Can you easily adjust how you're spending your time?



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