Ignatian Leadership in Jesuit Schools

Resources for Reflection and Evaluation

Joseph F. O'Connell, S.J.
In gratitude to all who served so generously as consultant and staff members of the JSEA COMMISSION ON RESEARCH & DEVELOPMENT during its nearly twenty year history from its inception in 1976.

James H. Baker, S.J.
Consultant Member 1978-1980
Associate Director 1980-1985
Consultant Member 1985-1987

Charles J. Beirne, S.J.
Associate Director 1977-1978
Consultant Member 1979-1983

Bernard L. Bouillette, Ph.D.
Consultant Member 1982-1989

James M. Bowler, S.J.
Consultant Member 1978-1982
Associate Director 1986-1987

James P. Bradley, S.J.
Associate Director 1977-1983
Director 1983-1987
Consultant Member 1987-1988

Frank J. Cody, Ph.D.
Consultant Member 1986-1989

Charles P. Costello, S.J.
JSEA President 1986-1992

Nora Cronin, P.B.V.M.
Consultant Member 1989-1995

Leo B. Lackamp
Consultant Member 1978-1982

Timothy R. Lannon, S.J.
Consultant Member 1992-1995

Carolyn Lausch
Consultant Member 1992-1995

Stephen E. Lovette, Ph.D.
Consultant Member 1981-1982

Richard L. McCurdy, S.J.
Consultant Member 1978-1983

Edwin J. McDermott, S.J.
JSEA President (1970) 1976-1977

Carl E. Meirose, S.J.
JSEA President 1992-1996

Ralph E. Metts, S.J.
Associate Director 1988-1995

Mary Ann Meyer
Consultant Member 1987-1992

Robert R. Newton, Ed.D.
Consultant Member 1978-1981

Robert A. Perrotta, Ph.D.
Consultant Member 1989-1995

Lawrence H. Siewert
Consultant Member 1989-1992

Joseph E. Snyder, Ed.D.
Consultant Member 1983-1990

Robert J. Starratt, Ph.D.
Director 1977-1983
Associate Director 1983-1984
Consultant Member 1984-1986

Daniel J. Sullivan, S.J.
Consultant Member 1988-1989

Michael D. Trainor
Consultant Member 1982-1989

Francis W. Turnbull, S.J.
Executive Assistant 1994-1995
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Jesuit schools aim to educate young men and women of competence, conscience and compassion. They endeavor to form leaders who will live a life of service for others in imitation of Christ. They strive to graduate people who are committed to the Ignatian vision of continually choosing to do the greater good that can be done within and beyond the ordinary opportunities of daily life and work. Naturally, the same ideals of Ignatian leadership that Jesuit schools propose for their students and graduates pertain just as well to the members of their administration, faculty and staff.

Accordingly, the Jesuit Secondary Education Association (JSEA) was asked to put together resource materials to help Jesuit schools evaluate their leadership people, particularly those in the positions of president and principal. Clearly faculty, staff and other administrators also play important roles of leadership in the school. So while the focus of the materials may seem to rest on the roles of president and principal, I hope that much of what will be said and offered in terms of tools, processes and principles can be adapted and applied *mutatis mutandis* to other significant roles of Ignatian leadership in Jesuit schools.

In 1990, the JSEA Commission on Research and Development (CORD) surveyed current and past presidents and principals of Jesuit schools to find out how they viewed the interrelationship of these two significant roles. Much of what resulted from that research was used in constructing the processes and tools included here. In addition, I reviewed many of the instruments which Jesuit schools currently use. I also studied evaluation materials that have been published and are available commercially.

It is safe to assume that no one process or tool will meet the needs of every situation. Schools should have options to choose from and to modify as they see fit. The challenge is to develop materials that are easy to use and that will produce worthwhile results. Ultimately, an evaluation should result in helpful recommendations for the person being evaluated as well as useful information for the institution itself. Ideally, the process should help people clarify and refine their expectations of leadership so that there is a shared consensus about what leadership’s focus should be in the future.

Many good and practical things have been written about evaluating school heads. Rather than reiterating those, I have tried, instead, to concentrate on processes and tools congruent with the Jesuit character and Ignatian vision of our schools, with particular emphasis on the critical place of reflection in the evaluation of Jesuit school leadership.

It is clear, however, that simply offering a practical kit of resource materials, without providing some background and context about how its contents should be used, would be inadequate. School people will use anything that shows promise of working. Sometimes their instincts are right. Under the constraints of time, however, less effort may go into thinking through the actual purpose and design of the evaluation process itself than into selecting and adapting the materials to be used.

Our immediate “how-to-do” concerns sometimes outrun more fundamental questions relating to who we are and what we want to accomplish, so that the proverbial tail begins to wag the well-known dog. Still, it is clear from reactions to earlier drafts that many people want to get right to the practical, concrete tools that will help them with reflection and evaluation. Thus, I have organized the materials into five sections.

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Preface

Section I lays out some questions to be thought through in setting up an evaluation process. The section covers such important topics as strategy, design, timing, and frequency of evaluation. It concludes with a list of fundamental Ignatian criteria for whatever process a school chooses to use.

Section II is a collection of tools and processes, any one of which can be used to help evaluate Ignatian leadership within a Jesuit school context. A short introduction describes each tool or process and offers some suggestions about when and how the material might be used. In many cases, sample reflection sheets are provided.

Section III deals with the Administrative Leadership Profile Survey (ALPS), an instrument developed by CORD that is available from JSEA for use by Jesuit schools. There are two versions of the instrument; one assesses the role and performance of the president; the other examines the role and performance of the principal. The survey also includes a section that looks at the organizational health of the school. This section of the survey is also availed as a separate instrument. Samples of the surveys are included.

Section IV sets forth some basic principles to keep in mind while thinking through an evaluation process. The section emphasizes reflection as an important ingredient in evaluating Ignatian leadership.

Finally, there is an appendix containing suggestions to help people handle criticism. Among the suggestions are two strategies from the field of neuro-linguistic programming that describe exercises which individuals can use to achieve a productive frame of mind from which to examine their evaluation results.

What follows, then, are resources for reflection and evaluation that have been designed specifically to help Jesuit schools and their personnel look at the vital area of Ignatian leadership. I hope that these materials will assist Jesuit schools in their efforts to provide mature systems of leadership formation, support and evaluation.

As we learn from one another’s reflections about living out the ideals of Ignatian leadership in the context of Jesuit schools, I hope we can enrich the resources offered here with many more creative ideas that address the whole spectrum of leadership roles in a Jesuit school, including students, teachers, staff members, department chairs, program directors, administrators and trustees.

By way of a concluding note, there are some acknowledgements I should make. I am indebted to the current members of the Commission who consistently urged completion of the project and patiently reviewed numerous drafts of the work in progress. I am grateful, too, to the Jesuit school board chairs, presidents, principals and members of the Commission of Assistants to the Provincials for Education (CAPE) who reacted to an earlier draft and made suggestions which have resulted, I believe, in a much improved product. My special thanks go to Frank Turnbull, S.J., who painstakingly oversaw the details of proofreading and readying the manuscript for publication. Lastly, I deeply appreciate the personal care, steadfast support and indulgent understanding of my colleague and associate Ralph Metts, S.J.

Joseph F. O’Connell, S.J.
Consultant Member 1982-1986
Associate Director 1986-1987
Director 1987-1995
President 1996-2005
Section I
Questions in Planning an Evaluation Process

There are several questions to be thought through in planning an evaluation process. First of all, is it a desirable thing to do at this point in time? What are the reasons for the evaluation? Are there certain assumptions, perhaps, that people are making about the outcome of the evaluation that may or may not be valid? Will it be part of an informed process promoting regular and responsible evaluation of school leadership and personnel throughout the system? Is it a crisis intervention strategy for handling a personnel situation that calls for major change in a person’s style and behavior? If the latter is the case then it might be well to think further about who should, can and will change.

Who should change? Has this expectation been communicated personally to the leader involved? With what result? Who has determined that a change is desirable? Has there been reasonable documentation of the imperative for change? What will likely happen if no change occurs? Is it just the leader under scrutiny who needs to change or will change be required of others as well? Who can change? Is it reasonable to expect that the person will be capable of making the kind of attitudinal or behavioral adjustment that might be deemed necessary? What supports will be available to help the leader do so? If he or she cannot make the change, what then? Who will change? What is the motivation that will lead the person to change, alter behavior, modify actions, redirect energies, eliminate activities, adjust relationships, or simply approach things with a different attitude? Some degree of commitment will be needed in order for the individual conscientiously to attempt a change for the better. How will that commitment be obtained?

Strategic Questions

Secondly, there are many strategic decisions that need to be made in going forward with leadership evaluation:

- People need to be clear about who is calling for the evaluation and who will be the recipient of reports that result from the evaluation.
- The purpose and goals of the evaluation process need to be determined and communicated to those involved.
- Decisions have to be made about the design of the evaluation process and of instruments that will be used in the process (see below).
- A clear determination should be made about who will have ultimate say about how the evaluation proceeds.
- Someone needs to be assigned to work with the leader being evaluated to get his or her input into the process, especially in terms of the criteria that will be used in evaluating performance.
- The method of documentation needs to be established (e.g., what will be included in the official record and who will have access to it?).
- A plan should be in place for giving feedback on the results of the evaluation to the leader being evaluated.
- Someone should be prepared to work with the leader afterwards to follow up on the recommendations that result from the evaluation.
- There is the question of what from the evaluation, if anything, should be made public. If there is to be a public report, who will receive it, how should
it be done, and what form should it take?

Arrangements should be made to evaluate the whole process once it is over in order to ascertain what has been learned from implementing the evaluation that might be useful the next time.

Lastly, provision should be made for sorting out issues that may emerge during the evaluation that deserve further study and evaluation by the institution.

**Design Questions**

More specific questions can be expected to arise in working out the design of the evaluation process:

- What will be the input of the leader being evaluated into the selection of the process and the tools that will be used to gather information?

- Who will be asked to participate in the evaluation process? How will their level of participation be appropriate to their involvement in the school and their investment in the outcome of the evaluation process? Is what they are being asked to do by way of evaluation commensurate with their knowledge of the role and their experience of the person?

- Should different procedures be used for different constituencies (e.g., parents, faculty, students)? If individuals or groups of people are to be selected from any of the constituencies, how will they be chosen?

- How will confidentiality be respected on the part of both the participants and the institution? To what extent is discussion and consensus of viewpoints considered desirable?

- Given the purpose and goals of the evaluation process, what kind of information needs to be collected? How should that information be gathered (e.g., records, correspondence, committee reports, newsletters, clippings, time logs, professional portfolio)? What tools or instruments will be used (e.g., private interview, structured survey, open-ended questionnaire)?

- Check the presuppositions of language that will be used in the evaluation process. For example, “Strengths and Weaknesses” is commonly used terminology. “Limitations” may be a more appropriate word for “weaknesses” (a concocted term that only seems to appear in personnel evaluations and comes remarkably close to sounding sinful). Identification of specific “limitations” may help the leader realize that he or she needs to find a way to compensate in a deficient area (e.g., through someone on staff who brings the necessary complementary skills). The aim is to make the leader’s personal and professional goal setting after the evaluation as reasonable and realistic as possible.

- What will be the schedule, order and timing of the evaluation process? What procedures need to be in place at each step of the process?

- How will participants be thanked for their participation? How will they be informed about any results that are made public?

- Ultimately, is the process one that promises to achieve the purpose and goals of the evaluation? Is it likely to produce useful results in line with the criteria agreed upon for evaluating the leader’s performance? Is it a fair and just process consistent with the school’s mission and philosophy? Would those who designed the process be willing to undergo it if they were being evaluated?

**Timing Questions**

An aim to keep in mind in setting up the evaluation process is to keep it smart and simple. First of all, conduct the evaluation at a time when people’s energies are likely to be at their highest. Ideally, you want to solicit input that is thoughtful, considerate and reasonably objective; work, therefore, to create a positive environment
for the evaluation. Avoid the more hectic periods in the academic year. While there is never absolute calm in the life of a school, try to predict when there may be fewer storms to weather. Insofar as possible, do not conduct the evaluation at a time when people are reacting to the immediacy of a stressful situation. Consider, moreover, the needs and concerns of the leader being evaluated. In terms of timing, find out what would give him or her ample opportunity to reflect on the results and incorporate what may be learned from doing so into his or her personal and professional goals for the months ahead.

Secondly, keep the time period for the evaluation from start to finish mercifully short. Do not allow the evaluation to drag on indefinitely. It is fair to assume that neither those evaluating nor the one being evaluated care to hang fire for long. Also, whatever instruments are used in the process should be such that they can be completed easily within a reasonably short span of time and still produce worthwhile information. Four to six weeks from start to finish should be adequate time to gather data from various sources and report back the results.

**Frequency Questions**

How often should one expect to be evaluated? Ironically, of course, anyone in a leadership position is continually being evaluated—albeit on an informal basis with a lot of Monday morning quarterbacking—by almost every constituency that makes up the school community. How often should a formal evaluation of leadership be done? Some formal evaluation is recommended during every year of service in a leadership role. Obviously the ideal is a habitual pattern of experience, reflection, action and evaluation. It might be more reasonable, however, to talk about levels of formal evaluation in terms of three-year cycles. The following examples, which can be read as applying primarily to the president but could be easily adapted to other leadership positions, are offered only by way of suggestion:

(1) **First year in the position • Level 1 Evaluation**: Involving a couple of people reviewing and clarifying expectations and the position description (more informal in nature and primarily with board chair and key administrators).

(II) **Second year in the position • Level 2 Evaluation**: Involving a few select people from different constituencies (e.g., board, administration, faculty and staff, parents) reflecting on competencies, identifying areas needing attention, refining support systems (also a natural lead-in to a more detailed process in the third year).

(III) **Third year in the position • Level 3 Evaluation**: Involving people significantly affected by and concerned with the leadership position, using a more formal, detailed process (using tools such as a short survey) reflecting on goals and accomplishments, refining expectations, calling for a strategic leadership plan.

(IV) **Fourth year in the position • Level 1 Evaluation**: Involving a couple of people reviewing the leadership plan (more informal in nature and primarily with board chair and key administrators).

(V) **Fifth year in the position • Level 2 Evaluation**: Involving a few select people from different constituencies (e.g., board, administration, faculty and staff, parents) reflecting on progress in meeting objectives of the leadership plan (also a natural lead-in to a more detailed process in the sixth year).

(VI) **Sixth year in the position • Level 3 Evaluation**: Involving people significantly affected by and concerned with the leadership position, using a more comprehensive process (involving the use of tools such as interviews and reflectionnaires) reflecting on goals and accomplishments, setting institutional and leadership priorities for the future.
(VII) Etc.

Process Questions

Of all the things to be considered in developing a plan for evaluating Ignatian leadership in Jesuit schools, most important are the fundamental questions that should be asked of the process as a whole. Those fundamental questions and their implied values are easily derived from the characteristics of Jesuit education:

1. Does the process start from the principle that we are all sinners wholeheartedly loved by God and called by God to holiness?

2. Does the process demonstrate a generous love and concern for all involved?

3. Does the process invite people to examine genuinely and realistically obstacles to personal freedom and growth?

4. Does the process follow the model of Jesus Christ who gave himself for others that they might have life and have it in abundance? In other words, is the process life-giving?

5. Does the process promote the human dignity and human rights of all? Does it recognize conversion, reconciliation and healing as fundamental needs of the school community?

6. Does the process invite people to be companions to one another in the ministry of leadership and teaching?

7. Does the process attempt to foster community and collaboration?

8. Does the process hold excellence in all things as a standard of evaluation?

9. Does the process encourage growth in leadership and vision?

10. Does the process foster learning through the Ignatian dynamic interplay of experience, reflection, action?

Without a doubt, the Ignatian norm of the magis should be the guiding principle. What will lead to the greater glory of God, the greater service of one's neighbor and the greater good of the school community? Above all else then, a spirit of discerning what is the greater good to be done should characterize the conversation we call the evaluation of Ignatian leadership in Jesuit schools.
Section II
Tools and Processes of Reflection and Evaluation

The pages of this section describe a variety and processes designed to help people reflect on and evaluate Ignatian leadership in Jesuit schools. The assortment ranges from exercises ready-made for use in an evaluation process to collections of criteria, frequently in the form of questions or statements, around which an evaluation process may be constructed. The materials vary in content, approach and style. Some will be appealing because of their obvious practicality; others will be attractive by reason of the particularly challenging features they contain. A number of exercises are intentionally more personal and self-reflective and therefore less readily adaptable for use in an external review process.

For the most part, each tool or process appearing in the pages that follow can be used on its own, independently of the others. Occasionally, however, there is an intended sequence and necessary relationship of one piece to the next. The choice of materials to use will depend largely on the nature and scope of the evaluation process. You may come upon a single tool that you judge will serve quite well as the centerpiece of an evaluation process. You may find it desirable to modify a particular process to better fit the context of your school. You may perceive an advantage to working with a combination of ideas, borrowing from this and that suggestion. On the other hand, you may be sparked to create something wholly different. Whatever materials are finally used in the evaluation process obviously need to be well organized, clearly laid out, and credibly presented.

No matter what tools and processes are ultimately chosen, they should call for reflection and assessment by the leader whose performance is being evaluated, as well as by those who are being asked to participate in evaluating his or her leadership. In other words, the one whose performance is being evaluated should have ample opportunity to complete, as part of his or her own reflective self-assessment, the same instruments, surveys or questionnaires that participants in the evaluation are being invited to use.

What follows is a brief preview outlining the resources contained in this section. More information, including suggestions about when and how a particular tool or process might be used, will be found in the description that introduces it.

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Using Position Descriptions

Below is a brief discussion on using your position description as an evaluation tool. Three stages are proposed for the evaluation process: First, review your position in light of your own experience (some questions are suggested). Second, write or revise the position description as you see it (a format and worksheet are provided). Third, discuss your proposed revision with the person to whom you are accountable.

Written position descriptions are natural starting points in the evaluation of school leadership, and, for that matter, of all personnel in the school. If anything, position descriptions are interesting sources of information for those who wonder what people do all day long in their offices. In fact, rather than staying carefully stored, unfrayed in a file drawer, position descriptions should be pulled out and used more frequently as tools of reflection and communication, particularly in terms of sorting through and clarifying expectations regarding a person’s performance in the position. Not surprisingly, evidence from the evaluation of school administrators in general points out that (a) faculty and staff often do not know what the administrator’s position actually entails, and (b) administrators frequently do not have a clear understanding beforehand about what criteria will be used in the evaluation of their performance. There can be vast differences of perception about the overall nature and function of a position, as in the case of principals, for example, who define themselves as instructional leaders and supervisors who see them as building administrators.

Position descriptions are also proper places for specifying performance criteria and methods of evaluation and for detailing procedures for periodically reviewing and revising roles and responsibilities in light of new goals and changing expectations. Of themselves, position descriptions are incomplete sources of evaluative criteria. Other documents should also be considered, such as statements of purpose, long-range plans and goals that the school has formulated. In addition, there is a wealth of material to be found in the publications of the Society of Jesus (at the international, national and provincial levels) and the Jesuit Secondary Education Association. Another complement to position descriptions for use in the evaluation process might be a description of the Jesuit school teacher, administrator or leadership team modeled on the school’s “Profile of the Graduate of a Jesuit High School at Graduation.” Last and by no means least, the personal as well as professional leadership goals of the person whose performance is being evaluated should be taken into account.

A position description is a written statement of the elements which are seen by the organization to constitute a particular position. It is a tool for helping individuals within the organization to clarify expectations of a position so that they can interact appropriately with the person in it. A position description also offers a basis for reviewing the position and evaluating performance.

Formulation of a position description for an existing position should begin by having the person who occupies the position draft a description of the position based on

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2 E.g., In addition to The Characteristics of Jesuit Education, there is the companion volume, Ignatian Pedagogy: A Practical Approach (Rome: Society of Jesus, 1993). Both can be found in Foundations (Washington, D.C.: JSEA, 1994), a compendium of major documents on Jesuit education published since the foundation of the JSEA in 1970. Two other recent publications also come to mind: “Qualities of a President” (JSEA CAPE, 1989) and “Profile of a Board of Trustees” (JSEA CAPE, 1992). We have included the CAPE description, “Qualities of a President,” as one resource that might be adapted for use in an evaluation process.

Using Position Descriptions

his or her experience and understanding of it. With the draft in hand, it is then easier to talk concretely about what the position should or should not entail. A logical next step would lead to the negotiation of recommendations relating to the position or the performance of the person holding it.

Essentially, a complete position description should contain (a) a statement of the position’s overall purpose and function, (b) a listing of the duties for which the person will be held accountable, (c) a description of agreed upon lines of authority and communications, (d) specification of the person’s role in planning and decision making, (e) criteria and methods of assessing the person’s performance, and (f) procedures for periodically revising the position description.
Reflecting on Your Leadership Position

Here are ten questions that you might find thought provoking as you reflect on your experience in the position. Many more questions will likely come to mind as you work on your position description. At some point, you may wish to share the results of your reflection with the person or team members with whom you work.

1. What do I enjoy most about my position?

2. In what ways does the position call upon my talents and interests?

3. What one thing would I gladly drop from my position description if I could?

4. What functions are there that only I can carry out and no one else?

5. How has my position changed (or not changed) over the years?
6. Where (if at all) does the position description fail to match the reality of what I do day in and day out?

7. What functions do I find myself carrying out that more properly belong in someone else’s position description?

8. What things (if any) should I be doing that are not included in my position description?

9. Where am I less than clear about what my role should be?

10. In what ways does my position description address my responsibility for the Catholic and Jesuit identity and mission of the school?
Position Description Format

(1) DATE
Date of the present version of the position description.

(2) TITLE
The organizational name for the position.

(3) FUNCTION
A brief statement of the general nature and primary purpose of the position.

(4) DUTIES
A list of the duties for which the person in the position is responsible and accountable.

(5) AUTHORITY
The position in the organization to which the person in the position is accountable, and other positions in the organization which are, in turn, accountable to this position.

(6) COMMUNICATIONS AND RELATIONSHIPS
Those positions or people with whom the incumbent needs to have contact in order to carry out the duties of the position and to serve the best interests of the organization.

(7) ROLES IN PLANNING AND DECISION MAKING
Any or all of four major roles in planning and decision making that the incumbent is expected to play with respect to specific policy or program areas. (Evaluator – responsible for regular assessment in a specific policy or program area; Recommender – expected to develop recommendations about possible actions to take in a specific policy or program area; Decider – makes the final decision about what action will be taken in a specific policy or program area; Implementer – carries out the action called for by the decider in a specific policy or program area.)

(8) PROCESS OF CHANGE
Description of how new and creative ideas of the incumbent are solicited and brought into the organization.

(9) PERFORMANCE EVALUATION
Performance criteria and methods of evaluation to be used in assessing the person’s performance in the position.

(10) REVIEW AND REVISION
Procedure for reviewing and revising the position description in light of new goals, policies or criteria.
Position Description Worksheet

NAME

_________________________________________________________________________________

TITLE

_________________________________________________________________________________

FUNCTION (Brief statement of the nature and purpose of my position)

_________________________________________________________________________________

_________________________________________________________________________________

_________________________________________________________________________________

_________________________________________________________________________________

DUTIES (List of duties for which I am responsible and accountable)

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Position Description Worksheet

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AUTHORITY

Position to which I am accountable

- 

-
Position Description Worksheet

Position(s) accountable to me

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COMMUNICATIONS AND RELATIONSHIPS (People who are not accountable to me but with whom I need to communicate and/or work)

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ROLES IN PLANNING AND DECISION MAKING (Evaluator of policies or programs, Recommender of policies or programs, Decider on policies or programs, or Implementer of policies or programs)

Policy/Program Area

__________________________ My Role in it ______________________

Policy/Program Area

__________________________ My Role in it ______________________

Policy/Program Area

__________________________ My Role in it ______________________

Policy/Program Area

__________________________ My Role in it ______________________
Position Description Worksheet

Policy/Program Area
____________________________________ My Role in it ______________________
Policy/Program Area
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Policy/Program Area
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Policy/Program Area
____________________________________ My Role in it ______________________

PROCESS OF CHANGE (Ways in which my ideas are solicited by the school)
_________________________________________________________________________________
_________________________________________________________________________________
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PERFORMANCE EVALUATION

Criteria (Criteria for evaluating the way in which I carry out my responsibilities)
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Position Description Worksheet

Methods (Methods for evaluating my performance, including who will be involved and how often)

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REVIEW AND REVISION (Procedure for updating my position description)

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Reviewing Leadership Accomplishments

This is a natural reflective exercise. It suggests focusing the review on a couple of areas of responsibility rather than on every aspect of leadership. The exercise is fitting for an informal, low-key evaluation process. At the same time, it offers some good points for conversation with the person to whom you are accountable. There are three parts to the exercise: (1) selection of one or two areas for review (could be done in dialogue); (2) listing of accomplishments in the area(s); (3) identification of any immediate or longer term needs to be addressed in the area(s); (4) examination of supports you might need in the area(s); (5) development of strategies for how you want to deal with the area(s) in the future. A list of some suggested areas and a worksheet for reviewing accomplishments are provided.

Leadership Areas for the President:

- Jesuit Institutional Vision, Leadership and Policy Development
- Mission Planning and Development (including Long Range Planning)
- Resource Planning and Development (including Fund Raising, Financial Planning and Management, Personnel Planning and Management)
- Plant and Facilities Planning and Management
- Board Development
- Board Relations
- President-Principal and Administrative Relations
- Parents, Alumni/ae Relations and Development
- Jesuit Relations
- Public Relations and Communications (e.g., civic community and local church)
- Institutional Evaluation (covering such areas as Administration, Faculty and Staff, Curriculum, Instruction, Activities, Organizational Structure and Management Procedures).
- Other ______________________________

Leadership Areas for the Principal:

- Jesuit Educational Leadership and Policy Development
- Mission Promotion and Integration
- Curricular and Instructional Evaluation and Planning
- Principal-President and Administrative Relations
- Faculty and Staff Development
- Faculty and Staff Relations
- Student Relations
- Parent Relations
- Jesuit Relations
- Public Relations and Communications (e.g., civic community, local church, other schools, educational agencies)
- Admissions Planning and Development
- Resource Management (including Financial Management, Personnel Management)
- Co-Curricular Evaluation and Planning
- Student Life Planning
- School Management.
- Other ______________________________
Reviewing Leadership Accomplishments

Select a couple of major areas for which you are responsible. List your accomplishments in those areas. What do you see to be immediate needs to be addressed in those areas? What do you see to be longer term needs? What specific help or support will you need in those areas? What are some strategies to pursue?

Review your list with the person or persons responsible for evaluating your performance as president or principal. Do they agree with your perceptions? What accomplishments, needs, or strategies do they suggest in addition to the ones you have listed? You may also wish to review the list with those people whose cooperation and support enables you to carry out your responsibilities effectively. How are they included in your planning, especially in light of whatever assistance and support you feel you will need in the future?
### Leadership Accomplishments

<table>
<thead>
<tr>
<th>AREA OF RESPONSIBILITY:</th>
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<td>Accomplishments:</td>
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<th>Immediate Needs:</th>
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<th>Longer Term Needs:</th>
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<th>Assistance or Support:</th>
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<th>Strategies:</th>
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Leadership Perceptionnaire

Perceptionnaire—Evaluation

“I am (or he/she is) a __________________________ leader in the school because

Descriptor

I (he/she) _____________________________________________________________________________. ”

Illustration

The Perceptionnaire is an easy and engaging exercise which can be readily adapted to different leadership roles (e.g., president, principal, teacher, guidance counselor, department chair). It is an exercise suitable for use by people who work directly with the individual. The exercise solicits people’s perceptions of you in the position by asking them simply to describe the kind of leader (or teacher, counselor, coach, etc.) you are and then to give specific behavioral illustrations for each word that they use to describe you (see Example 1 below).

By “descriptor” is meant a modifier that describes the way in which the individual in the role is perceived (e.g., visionary, available, open, on the ball, committed, friendly, caring, organized, hard-working). A descriptor may be used more than once and should be followed by one or more specific illustrations.

An “illustration” is a pattern of concrete behavior on the part of the individual which supports the descriptor that was used (e.g., takes seriously the spirituality of faculty and students, always comes prepared to meetings, helps others to see the logic of their thinking, weighs alternatives, seeks people’s opinions, takes time out to say ‘hello”).

Our president is a visionary leader because he...

- suggests practical ways the school can be a partner in the social justice concerns of our Church, the Society of Jesus and our civic community.
- talks very concretely to alumni and benefactors about how they can support the Ignatian vision of our school.
- foresaw the importance five years ago of remodeling our facilities to encourage more learning through hands-on experience.

Example 1 – Completions of the Perceptionnaire

The Perceptionnaire should be completed by the person undergoing the evaluation as well as by those participating in the evaluation. Variations of the exercise can be developed to generate additional kinds of information. For a sense of how the exercise can evolve to include other areas, see the pages and worksheets that follow.

The Perceptionnaire is an excellent exercise to use with a leadership team. Members of the team complete the Perceptionnaire on themselves or on the team as a whole and then compare results. The exercise may also be used as the first step in creating a profile of the administrator or teacher along the lines of the Profile of the Graduate at Graduation.
Perceptionnaire–Development Areas

“I want to (or he/she could) become better or more proficient at:
_______________________________________________________________________________________ .”

Skill

“To do so I (or he/she) might try:
___________________________________________________________________________________ .”

Activity

“I (or he/she) could use the following special help:
___________________________________________________________________________________ .”

Resource

Development Areas

There are many ways to expand on the Perceptionnaire exercise. After completing the first part, you may then choose to turn to a resource development phase of the as shown above.

“Better or more proficient at” suggests a skill in which the individual might develop greater facility (e.g., long-range planning, delegating, involving others in decision making, communicating with faculty). “Activity” gives an idea of what the individual might do to gain competence in the skill (e.g., use focus groups or town hall meetings). “Resource” describes the kind of help the individual might need, assuming that for him or her to become proficient will require time and effort—and maybe even coaching and support (e.g., having a board member or administrator work with him or her on long-range planning, reviewing procedures for delegating tasks, identifying decision making roles that others could take).

Our principal could become better at soliciting and listening to faculty opinions. [Skill]
   ⦿ To do so she might try setting up focus groups or townhall meetings. [Activity]
   ⦿ She might think about having someone else chair and lead the sessions. [Resource]

Example 2 – Perceptionnaire as a Professional Development Tool

Collating Results

Collate the results. Review the list to see if there are descriptors or specific behaviors not mentioned that might be desirable. It is possible to rate descriptors, specific behaviors, and proficiency areas in terms of importance (e.g., High, Moderate, Low). If this is done, it should be done by both the individual and the person or persons responsible for the evaluation. Note that the descriptors are qualities the person brings (or should bring) to the position, while the specific behaviors offer some ideas about expectations of the individual in the position. It would be appropriate to talk through what steps the individual plans to take in light of the results and what means of support should be made available.
### Priority | Descriptor | Illustration
--- | --- | ---
High | Visionary leadership | ‣ suggests practical ways the school can be a partner in the social justice concerns of our Church, the Society of Jesus and our civic community.  
‡ talks very concretely to alumni and benefactors about how they can support the Ignatian vision of the school.  
‡ foresaw the importance of remodeling our facilities to encourage more learning through hands on experience.
High | Hard-working | ‣ puts in long hours.  
‡ prepares thoroughly for meetings of every sort.
High | Available | ‣ schedules time so that people rarely have to wait for an appointment.
Moderate | Organized | ‣ brings management systems to bear on the other offices of the school.  
‡ oversaw electronic networking of offices.

**Example 3 – Evaluation Results**

<table>
<thead>
<tr>
<th>Priority</th>
<th>Skill</th>
<th>Activity</th>
<th>Resource</th>
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| Moderate | Involving others in decision making | ‣ focus groups of parents, alumni, etc.  
‡ townhall meetings | Someone else to chair on such occasions |
| High | Socializing and communicating with the faculty | ‣ occasional appearances in the faculty lounge  
‡ set up informal celebrations | Possibility of help from Jesuit community with TGIF socials |
| Moderate | Working more with the orientation of new teachers | ‣ set up mentoring program for new teachers | Consult Jesuit schools with such mentoring programs |
| Low | Demonstrating interest in student activities and sports | ‣ add one or two events to calendar per semester | |

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28 Ignatian Leadership in Jesuit Schools
Example 4 – Development Results
### Leadership Perceptionnaire Worksheet

<table>
<thead>
<tr>
<th>Priority</th>
<th>I am (or he/she is) a leader</th>
<th>because I (or he/she)…</th>
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Leadership Perceptionnaire

**Development Areas**

<table>
<thead>
<tr>
<th>Priority</th>
<th>I want to (or he/she could) become better or more proficient at…</th>
<th>Some things I (or he/she) might try are:</th>
<th>I (or he/she) could use the following help:</th>
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This is a simple but powerful exercise. It is perfect for someone new to a leadership position where an elaborate evaluation procedure might be premature. It is also a fine tool if you are looking for a reflective process to share in conversation with a colleague or friend. The same exercise works well with a leadership team.

You can do a variation on this exercise by seeing what image comes to mind just for the leadership role itself, then how your image might change or not as you see yourself in that role, and finally, what difference it makes when you emphasize the Ignatian dimension of the role.

1. In a quiet, contemplative mode, think about your leadership to date. What images come to mind that describe what the experience has been for you? (You can also start with words and see if they come together to form an image.) Explore the images with as much detail as you like.

2. Then select, draw, describe or write about three images (they may be different or interrelated) that describe your leadership tenure to date. Explain what the images mean to you. Talk about what you would want to retain and change regarding the images. How do you see yourself and others working to make those images even more satisfying?

3. Talk through the above reflection with someone whose confidence you enjoy and who can be objective and constructive in listening to you.

4. Afterwards, develop your leadership goals for next year. What will help you to achieve those goals? To whom might you turn for help and support?
Mental Pictures of the Leader

This is an easy process to use. It asks you to focus on changes that have taken place in the school and then invites you to reflect on the implications you see for yourself. When you have finished the exercise, you may wish to take some time to dialogue with someone about your reflection. Then prepare to report the results of your reflection to the person to whom you are immediately accountable (e.g., board chair, president, principal, administrator, department chair).

Take some time to reflect on how you saw the school either when you first came into your current leadership position or when you underwent your last evaluation. Draw a mental (or actual) picture of the school as you saw it then. What appeared to be the major challenges it faced then? How would you describe yourself in relation to the institution then (perhaps a metaphor comes to mind)?

The school as it was (some time in the past):

Now reflect on the school as you see it now. What would be the picture that you would draw now? What happened with respect to the major challenges you saw earlier? What specific challenges face the school now? How do you see yourself in relation to the institution today in light of those challenges and present circumstances?

The school as it is now:

What do you see yourself continuing to do? What do you feel you need to stop doing (or do less of)? What do you sense you need to start doing? What help will you need to take these steps?
Checking Expectations of Leadership

Expectations people have of what you should be doing as a leader can easily change without you even being aware of it. Often the people evaluating you are not conscious of the fact that their expectations of you have changed. This exercise can be done in a number of ways. One is a reflective look at the expectations you believe people have of you along the lines suggested below. Another involves actually graphing people’s expectations of you, using lines and labels to indicate expectations and their relative weight and importance (see the exercise “Graphic Expectations of Leadership”). Similar exercises can be used with an administrative team. (For a fuller treatment of this topic see “Realms and Reams of Expectations” in Section IV.)

1. What do you remember to have been the expectations of others (e.g., board, administration, faculty, parents) when you were appointed to your position (or renewed in your position)? How have those expectations changed over time?

2. Which expectations, in particular, do you believe you have met or are meeting satisfactorily? Are there expectations you are not sure about? If so, what can you do to check them out? Are there expectations which you feel are unrealistic? Are new expectations of you (explicit or implicit) emerging? How clear are they? Are they in line with an Ignatian vision of your leadership position? Do you have the resources necessary to match those expectations? What sort of help do you feel you will need in meeting those expectations?

3. Make a list of the people’s expectations that you want to assess further or negotiate more clearly. Set up a plan for doing so.
Graphic Expectations of Leadership

How leaders respond to what people expect of them is crucial to effective leadership. No one needs to tell you that there are folks in every constituency of the school who have expectations of what you should (or should not) do and how you should (or should not) act. Sometimes expectations are voiced; often they are not. Dealing with people’s expectations is a major task of leadership. The exercise below involves graphing people’s expectations of you in your leadership role. You may want to start by graphing your expectations of yourself and then what you understand to be people’s expectations of you. You may wish to invite others to participate. It is also an exercise that can be used with an administrative team or departmental group. You will find a sample graphic on the next page. (For a fuller treatment of this topic see “Realms and Reams of Expectations” in Section IV.)

1. Draw a large circle. Put your name or a symbol representing you at the center of the circle.

2. Indicate an expectation that people have of you by drawing an arrow from the perimeter toward your name or symbol at the center of the circle. Label the arrow with a description of the expectation [e.g., Promoting Ignatian Identity of the School]. You may want to use a different color ink for each constituency. The length of the arrow as well as its proximity to the center can be used to suggest the intensity and importance of the expectation.

3. Once you have completed the graphic there are several questions you might ask: What is your reaction to the graphic you have produced? Which expectations do you agree with? Which ones do you disagree with? Are there expectations you want to change? Are there conflicting expectations? Which expectations do you work hardest at meeting? How do the expectations you have graphed compare with the expectations you have of yourself? Are there new expectations to be negotiated?
Graphic Expectations of Leadership

Example – Graphic Expectations of Leadership
Leader's Examination of Consciousness

The following personal reflection is modeled after Ignatius’ simple but powerful suggestion of questions for self-examination: What have I done for Christ? What am I doing for Christ? What more ought I to do for Christ? The examination might well take place within the context of a prayerful reflection on a favorite Gospel passage. You may wish to share the results of your examination with a spiritual counselor.

1. In reviewing my tenure, what would I see as things I have done for Christ in terms of the people with whom and on whose behalf I work as a leader in the school?

2. In examining my current plans and activities, what would I highlight as things that I am doing for Christ in terms of the people with whom and on whose behalf I work as a leader in the school?

3. In setting my personal and professional goals for the future, what would I include as things that would help me to do more for Christ in terms of the people with whom and on whose behalf I work as a leader in the school?
Reflecting on Leadership Using
The Characteristics of Jesuit Education

The following questions are derived from Go Forth and Teach: The Characteristics of Jesuit Education (1987). Paragraph numbers from the document appear in parentheses. The questions suggest a prayerful, personal reflection rather than an external formal evaluation. You might begin by reviewing the questions and then select a few for more careful thought and reflection. At some point, you may wish to talk over your reflections with a colleague or friend.

1. In what ways do I affirm the goodness of the school and the school community? (23)
2. What do I do to ensure that every dimension of human development is incorporated into the educational and formational program of the school? (25)
3. What would I point to as evidence that quality of life and not simply academic performance or professional competence is the ultimate measure of Jesuit education in the school? (37)
4. How do I see that concern for students is foremost in the mind of faculty, staff, and administration? In what ways do I model for others care and concern for the individual person? (42)
5. What have I done to further my own personal, professional, and spiritual growth in recent years? (46)
6. How have I been able to help others realize and accept their own gifts and limitations? Where have I been able to help them to work effectively to overcome what are obstacles to their own growth in knowledge, love and freedom? (55)
7. What do I feel I have been able to do to transform the world view of the school so that it is more loving and just in its outlook? (57, 74)
8. To what extent do I find God in the midst of my work? In what ways have I been able to bring Christ and the gospel to others? (61, 63)
9. In what ways have I been able to help others integrate the faith and justice mission of the Society of Jesus into the day-to-day life of the school? (74)
10. How do I work at promoting the vision of Christian love and service caught in the phrase “men and women for others”? (82)
11. How have I been able to help the school community to see concern for the poor as a fundamental option for youth that cannot be ignored? (85)
12. What do I do to foster an appreciation for leadership and teaching as genuine ministries of the Church? How do I help the school community to relate to the local church and the local church to relate to the school community? (93, 97)
13. What steps have I taken to link the school to other Jesuit apostolic works? (98)
14. To what extent have I been successful in bringing about collaboration with other educational institutions? other churches? other faiths? (100)

15. How have I been effective in building a spirit of community in the school? What sort of leadership have I been able to provide for encouraging and supporting the spiritual development of faculty, staff, students and parents? (96)

16. Where would I say that I have made progress in promoting the belief that Jesuit education is about educating leaders in service? (110)

17. How have I been able to define “excellence” so that it is a realistic and true criterion for evaluating the school and its programs? (113)

18. What progress have I been able to make in getting the school and its community of educators to cooperate among themselves and with their colleagues in either Catholic or public education and with other institutions of learning? (115)

19. In what ways have I been able to broaden the scope of the school so that it is more catholic (universal) and international in terms of race and cultures? (151)

20. What have I done to increase the spirit of collaboration within the school community? (118)

21. What practical measures have I undertaken to enable the school community to reflect on the Jesuit identity of the school and to share more deeply in the meaning of Ignatian vision for the school? (139)

22. To what extent do I feel that I have the freedom and resources to make necessary changes in the school to achieve the aims of Jesuit education? (145)

23. How do I find myself helping the school to be more responsive to the particular needs of the local community it serves? (147)

24. How have I been able to translate Ignatian spirituality into terms that are meaningful for the school community? (155)

25. What particular Ignatian characteristic do I particularly seek to bring to the school through my leadership role?
Ten Dimensions of a Jesuit School and Ignatian Leadership

The ten dimensions and the questions accompanying them have been adapted from Go Forth and Teach: The Characteristics of Jesuit Education (1987). The questions suggest a prayerful, personal reflection rather than an external formal evaluation. You might start by reading Go Forth and Teach and picking a particular dimension and set of questions to consider more carefully. At some point, you may wish to talk over your reflections with a colleague or friend.

1. **Belief in God and the Goodness of Creation.** In what ways do I model for others the Ignatian principle of “Finding God in All Things”? What do I do to help others appreciate that we cooperate with God’s creation through working together to educate young men and women of competence, conscience and compassion?

2. **Concern for the Personal Growth of Each Individual.** In what ways do I show my personal care and concern for individual members of the school community? What do I do to ensure that concern for the personal growth of each individual student, faculty, staff member and administrator is a hallmark of our school?

3. **Growth in Knowledge and Freedom.** In what ways do I seek to grow personally and professionally in knowledge, love and freedom? What do I do to promote an educational philosophy that is profoundly concerned with the redemption of humanity and the transformation of the world?

4. **Commitment in Faith to Jesus Christ.** In what ways do my actions model Christ for others? What do I do to enable members of the school community to encounter the person of Christ in their lives as students, parents, teachers, staff members or administrators?
5. **Promotion of Justice in the World.** In what ways do I express my commitment to working toward a just and loving society? What do I do to demonstrate that putting our faith into practice needs to “begin at home” in the school?

6. **Service of the Church.** In what ways do I see my position as one of ministry in the Church? What do I do to encourage institutional collaboration with the local church in carrying out its mission of teaching and healing?

7. **Excellence in All Things.** To what extent do I incorporate the ideal of “the greater good” (*magis*) in my decision-making processes? What do I do to encourage and support excellence on the part of others in the school community?

8. **Collaboration in Community.** In what ways do I work with others collaboratively? What do I do to build a collaborative community dedicated to the ideals of Jesuit education?

9. **Discerning Vision for the Future.** In what ways do I bring prayerful reflection and discernment to my leadership in the school? What do I do to help others in the school community better understand and appreciate the Ignatian vision which is at the heart of Jesuit education?

10. **Ignatian Pedagogy.** In what ways do I make the Ignatian Pedagogical Paradigm of [Context] Experience ↔ Reflection ↔ Action [Evaluation] a dynamic dimension of my leadership? What do I do to encourage others to grow and develop as Ignatian educators?
Leadership Dialogue or Exchange

The following questions presume a dialogue or an exchange of letters in which the leader reflects openly with someone else on particular themes. Clearly you could work out with your colleague the topics or questions that would shape your dialogue or exchange of letters. The suggestion of letter writing may sound strange at first but it is a way not only of ritualizing the dialogue but also of keeping account of progress and developments as the conversation continues. The exchange might take place between a president and the chair of the board, or between a principal and the president, or between a principal and another administrator. You will find, by way of example, a fictional exchange between a president and the chair of the board in the pages that follow.

What have I been able to accomplish?

What has been particularly satisfying for me in terms of the Ignatian dimension of my leadership role?

What keeps me going?

What do I find difficult?

Where do I wish I had more expertise?

Where do I need help or support?

What could we accomplish in the months and years ahead?

Should you wish to focus more on the cooperative interrelationship, say between the president and the chair or between the president and the principal, then questions such as the following might be used in drafting the letter.

What qualities would I single out as characterizing our interrelationship? Which of these qualities is most important to me?

What difference does our interrelationship make in the school?

What do I particularly value about our interactions?

What have I found to be the most effective way of communicating with you?

What one thing would I like to work on getting from the interrelationship that I have not been able to obtain thus far?
To the Chair of the Board

St. John Berchman’s Prep
1599 Shoemaker Street
Malines, New Jersey 07401-6654

Office of the President

January 5, ____

Dear Mary Ellen,

No doubt you will recall how dubious I was nearly a year ago (less than enthusiastic would be closer to the truth) about our exchanging letters as president and chair. It seemed so artificial even as you described how beneficial you had found it during your tenure at St. Agnes College. Well, now I’m glad not only that we made it our New Year’s resolution but that we’ve kept it. As a veteran English teacher, I should have better appreciated the kind of reflection that letter writing stimulates.

For one thing, I believe it helped us to get to know one another faster and at a deeper level. While neither of us was new to the role of president and chair, we were new to one another in our roles a year ago. The first exchange was a real icebreaker for me. Secondly, I think our correspondence, in a funny way, has helped us not to make too many assumptions or jump to conclusions about what the other thinks. Thirdly, as highly introverted as I am, these occasional but regular exchanges give me the opportunity to stop and think, not just to assess where things are but to line up where I need to go as well. Bottom line answer to your question: Yes, it is a good process and I would definitely like to continue it this year. While we actually exceeded our goal of four interchanges by two, still four seems a reasonable enough expectation.

I am glad that you agree with me on what I perceive to have been my major accomplishments this past year. Again, thank you for the generous letter of commendation on behalf of the Board! Yes, I am very pleased with John’s performance this year in the development office. With your help, the work of the Board through the new committee structures is moving along quite well. There is very much a renewed enthusiasm and commitment among Board members. Almost makes me a bit nervous! And we’ve laid out what appears to be a fine strategic planning process. My major concern, however, continues to be the faculty. I really need some help to think this through.

As you know, I firmly believe that they (far more than the president and the leadership team) constitute the crucial group here at Berchman’s Prep. I very much want to see them take an active, leading role in our planning for the future. But this past year has me a bit worried that they may not be up to it. Let me just outline what I think some of the issues are...

Looking forward to hearing from you as we continue our exchange into the New Year. This may be one of those topics, like last year’s on the development office, where we may need to spend some quality time together discussing it in greater depth. Let me know what you think! Again Happy New Year to the entire Riley family!

Regards,

Peter Claudet
To the President

Date: Friday, 12-Jan-__ 03:44 PM
From: Mary Ellen Riley \Internet: (meriley@crown.stagnes.edu)
To: Peter Claudet \Internet: (pclaudet@iggy.loyola.edu)
Subject: Re: Letter of 5-Jan-__

Dear Peter,

Ditto your remarks about our letters! I’m fine with four again this year but I bet we do better than that again. Actually this is a test to see if you really do read your e-mail! One thing, seriously, before I respond to your concerns about the faculty’s involvement in our strategic planning process. You mentioned your high introversion in your letter and I had almost forgotten how much stress you said that is for you in the job. You sure handle it well! People experience you as very sociable and outgoing. I suspect that few would peg you as an introvert. Is that something you and I should talk more about, especially in terms of support for you as we move toward a major capital campaign?

I thoroughly agree with your concern about the faculty. You’ve put your finger on a crucial matter. And, as usual, you’ve done a splendid job of outlining the issues. I just don’t think it should all rest on your shoulders. I believe you are right about the tension between the corporate and the community models and how that’s perceived and experienced by our faculty. We must do something to mitigate that.

In my capacity as chair, perhaps I should do more to help Board members appreciate the unique nature of the faculty as a body of committed professionals. Our new committee structures should help in this regard. At the same time, I think we may need to create some informal (and enjoyable) occasions for Board-faculty interaction. Internally, I think Bob’s promoting Marsha to Academic AP was a great plus and might give him better credibility with the faculty. Before we go too far along, however, I wonder if it might not be a good idea for the two of us to raise this as an item for discussion at a leadership team meeting. What do you think?

In my heart of hearts, I would like to see Bob take this on as a priority for the rest of the year. You have enough on your plate as it is. I would be willing to hold off on announcing the strategic planning process and to re-examine the faculty’s role in it. Please give some thought to what I could do in my capacity as Board chair.

Many thanks for your letter. I look forward to our working together during the New Year. These are exciting times! Many thanks for your continued generous service to the community of SJBP!

Best wishes,

Mary Ellen
Leadership Achievement Opinionnaire

The Leadership Achievement Opinionnaire is rather straightforward. It asks for people’s written responses on three topics: (1) What do they see to be your significant achievements as school leader? (2) What do they think are the most important things you need to achieve through your leadership in the future? (3) What practical suggestions would they offer you for achieving those objectives? The results of the Opinionnaire should be collated. Accomplishments receiving consensus among the respondents should be shared with you. The person or body responsible for the evaluation should see to the prioritization of objectives (limiting them to a practicable number) and to the determination of which suggestions to pass on to you. A sample form follows.
Leadership Achievement Opinionnaire

A. What do you see that [name of school leader] has achieved over the past [number] years [or during his/her tenure thus far]? List below what you consider to be [his/her] five most significant achievements in the position.

(1) ___________________________________________________________________________________
_____________________________________________________________________________________
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(2) ___________________________________________________________________________________
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(3) ___________________________________________________________________________________
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(4) ___________________________________________________________________________________
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(5) ___________________________________________________________________________________
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Tools and Processes of Reflection and Evaluation  45
Leadership Achievement Opinionnaire

B. What do you foresee to be the three most important things that [name of school leader] should achieve over the next [number] years [or for the remainder of his/her tenure]?

(1) ___________________________________________________________________________________
   ___________________________________________________________________________________
   ___________________________________________________________________________________

(2) ___________________________________________________________________________________
   ___________________________________________________________________________________
   ___________________________________________________________________________________

(3) ___________________________________________________________________________________
   ___________________________________________________________________________________
   ___________________________________________________________________________________

C. What practical suggestions would you offer about how the individual should go about the objectives you suggested above?

________________________________________________________________________________________
________________________________________________________________________________________
________________________________________________________________________________________
________________________________________________________________________________________

D. Please add any further comments you would like to make.
Leadership Evaluation

The following pages contain a simple, easy to use format for evaluating a person in a leadership position. It invites participants in the evaluation process to rate how you meet their expectations on ten factors.

Naturally, modification of the factors and the items under them will be necessary in order to match the leadership position being evaluated. There is space for brief comments as one goes along and a page for additional comments appears at the end.

# Leadership Evaluation

<table>
<thead>
<tr>
<th>Factors</th>
<th>Rating</th>
<th>Comments</th>
</tr>
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<tbody>
<tr>
<td><strong>For each factor described below check the box that best reflects your experience of the person whom you are evaluating.</strong></td>
<td>Fails Expectations</td>
<td>Meets Expectations</td>
</tr>
<tr>
<td><strong>1. LEADERSHIP</strong></td>
<td></td>
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<tr>
<td>Promotes the Ignatian vision and Jesuit mission of the school; Motivates others to do their best; Supports initiatives for healthy change; Fosters unity and cooperation.</td>
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<tr>
<td><strong>2. COMMUNICATIONS</strong></td>
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<tr>
<td>Maintains effective two-way communications; Keeps attuned to constituents’ interests and concerns; Involves people appropriately in planning and decision making; Draws upon the wisdom and expertise of others.</td>
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<tr>
<td><strong>3. DECISION MAKING</strong></td>
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<tr>
<td>Makes timely, apt decisions; Identifies and evaluates issues; Generates alternatives; Reaches sound conclusions; Understands consequences; Follows through on implementation.</td>
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<tr>
<td><strong>4. HUMAN RESOURCE DEVELOPMENT</strong></td>
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<tr>
<td>Employs, monitors and supervises human resources effectively; Encourages personnel to set performance goals; Promotes personal, professional and spiritual growth of personnel.</td>
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<tr>
<td><strong>5. COLLABORATION</strong></td>
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<tr>
<td>Works well with others; Gains their respect; Delegates responsibilities appropriately; Shows care and concern for persons; Helps people feel valued by the school.</td>
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</tbody>
</table>
For each factor described below check the box that best reflects your experience of the person whom you are evaluating.

<table>
<thead>
<tr>
<th>Factors</th>
<th>Rating</th>
<th>Comments</th>
</tr>
</thead>
<tbody>
<tr>
<td>For each factor described below check the box that best reflects your experience of the person whom you are evaluating.</td>
<td>Fails Expectations</td>
<td>Meets Expectations</td>
</tr>
<tr>
<td>6. PROFESSIONAL COMPETENCE</td>
<td></td>
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<tr>
<td>Sees to the competent administration of the school; Provides proficient organization; Maintains high standards of performance and conduct; Deals with people fairly and justly.</td>
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<tr>
<td>7. PLANNING AND RESOURCE MANAGEMENT</td>
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<tr>
<td>Manages a process of ongoing strategic planning; Foresees needs; Allocates and coordinates resources judiciously; Sets and tracks priorities.</td>
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<tr>
<td>8. FINANCIAL MANAGEMENT</td>
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<tr>
<td>Forecasts financial needs; Proposes educationally as well as fiscally sound budgets; Keeps within budget; Approves and monitors expenditures; Works creatively to solve financial problems; Adapts to budgetary constraints.</td>
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<tr>
<td>9. DEVELOPMENT</td>
<td></td>
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<tr>
<td>Fosters loyalty and commitment to the school; Nurtures constituency support; Maintains good public relations; Supervises coordination and management of fund raising activities; Solicits contributions graciously; Balances fund raising responsibilities and other duties.</td>
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<td></td>
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<tr>
<td>10. PERSONAL CHARACTER</td>
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<tr>
<td>Assumes initiative; Inspires confidence; Demonstrates industry and commitment; Shows intelligence and understanding; Operates from Christian values; Acts with compassion and sensitivity; Models integrity; Welcomes accountability.</td>
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</tbody>
</table>
Leadership Evaluation
— Additional Comments —

Your Name: ______________________________ Date: __________________

Comments:
The Myers-Briggs Type Indicator (MBTI®) is an instrument designed to help people identify their personality preferences and leadership styles in accord with the premises of Carl Jung’s Psychological Types (Bollingen Series XX; Princeton University Press, 1971). If you are familiar with the instrument and the theory behind it, you may find it helpful to review your MBTI profile in light of your leadership experience. The booklet Introduction to Type® by Isabel Briggs Myers and revised by Linda K. Kirby and Katharine D. Myers (Consulting Psychologists Press, 1993) might be a very helpful resource.¹

¹Myers-Briggs Type Indicator, MBTI and Introduction to Type are registered trademarks of Consulting Psychologists Press, Inc. (577 College Avenue, Palo Alto, CA 94306). In addition to the works previously cited, the following are recommended: Gifts Differing by Isabel Briggs Myers (Palo Alto, CA: Consulting Psychologists Press, 1980, 1990); Please Understand Me by David Kiersey and Marilyn Bates (Del Mar, CA: Prometheus Nemesis Book Co., 1984); People Types and Tiger Stripes by Gordon Lawrence (Gainesville, Fla.: Center for Application of Psychological Type, Inc., 1982); Work, Play and Type by Judith Provost (Palo Alto, CA: Consulting Psychologists Press, 1990); Introduction to Type in Organizations by Sandra Krebs Hirsh and Jean M. Kummerow (Palo Alto, CA: Consulting Psychologists Press, 1987, 1990).

### Preferences

<table>
<thead>
<tr>
<th>EXTRAVERSION</th>
<th>INTROVERSION</th>
</tr>
</thead>
<tbody>
<tr>
<td>Outward energy</td>
<td>Interior energy</td>
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</tbody>
</table>

<table>
<thead>
<tr>
<th>SENSING</th>
<th>INtuition</th>
</tr>
</thead>
<tbody>
<tr>
<td>Perceiving concrete reality</td>
<td>Envisioning future possibilities</td>
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</table>

<table>
<thead>
<tr>
<th>THINKING</th>
<th>FEELING</th>
</tr>
</thead>
<tbody>
<tr>
<td>Reasoning through logical analysis</td>
<td>Deliberating in terms of people and values</td>
</tr>
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</table>

<table>
<thead>
<tr>
<th>JUDGING</th>
<th>PERCEIVING</th>
</tr>
</thead>
<tbody>
<tr>
<td>Closure oriented</td>
<td>Open ended</td>
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</tbody>
</table>

What is your MBTI Profile? ____________________________________

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EXTRAVERSION and INTROVERSION (ATTITUDES)
In what ways do you find that your preference for an extraverted or introverted attitude or stance toward the world (i.e., external vs. internal source of psychic energy or where you focus your attention, on the outer world of people and events or the inner world of experiences and ideas) is particularly helpful to you in your leadership position?

In what ways does your preference for extraversion or introversion add to the challenge of your leadership position?

SENSING and INTUITION (PERCEIVING FUNCTIONS)
In what ways do you find that your preference for the sensate or intuitive function in terms of perceiving (i.e., attending to specifics vs. looking at things globally as your way of getting information) is particularly helpful to you in your leadership position?

In what ways does your preference for the sensate or intuitive function add to the challenge of your leadership position?
THINKING and FEELING (JUDGING FUNCTIONS)

In what ways do you find that your preference for thinking or feeling as your judging function (i.e., analyzing things logically vs. weighing things in terms of people and values as you make your final decision) is particularly helpful to you in your leadership position?

In what ways does your preference for the thinking or feeling function add to the challenge of your leadership position?

JUDGING and PERCEIVING (ORIENTATION TO EXTERNAL WORLD)

Where do you find that your preference for dealing with the outer world of people and events from a stance either of judging or of perceiving (i.e., desire for closure vs. liking to hang loose) makes your leadership position easier?

In what ways do you find that your preference for judging or perceiving adds to the challenge of your leadership position?
DOMINANT and INFERIOR FUNCTIONS
If you experience one of your preferred functions as your “tried and true” friend, the function that you rely on the most or the one that seems to be your favorite, it is likely your “Dominant Function.” How would you characterize what you are called upon to do in your leadership position as particularly appealing to that function?

If you know your “Inferior Function” (usually the direct opposite of what you experience as your “Dominant Function”), in what ways does it manifest itself? What particular challenges does it raise for you in your leadership position?

USING AND COMPLEMENTING YOUR PROFILE
How might you rearrange your leadership responsibilities and work patterns to make better use of your preferences?

Looking at the opposite of your profile, how might you engage the preferences and talents of others in leadership to complement your profile?

What might you do to develop and exercise your preferences more?

What might you do to integrate your less preferred attitude and functions into your life and work?
Modifying Leadership

The following exercise uses the device of a list of adjectives to stimulate people’s thinking about how they experience you in your leadership position. It is a simple and easy to use tool that involves collating the results and sharing them with you.

Circle the adjectives listed on the following page which you feel fit the school leader whom you have been asked to evaluate. (If more appropriate adjectives come to mind, you may choose to use them.) Look at the words in terms of consistently describing the person as he or she carries out the responsibilities of his or her position.

Of the words that you have decided upon, select three to five which best describe how you experience the person in the performance of his or her job. State specifically how you see these adjectives applying to the individual.

<table>
<thead>
<tr>
<th>Adjective:</th>
<th>How it applies to the school leader:</th>
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What three to five adjectives would you want to be able to use for the person the next time you are called upon to evaluate him or her? What do you sense would have to happen before these adjectives could be appropriately used of the individual?

<table>
<thead>
<tr>
<th>Adjective:</th>
<th>What would have to happen?</th>
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</table>
### Leadership Modifiers

| Accessible | Empathetic | Objective |                      |
| Accountable | Encouraging | Open      |                      |
| Active      | Energetic   | Optimistic|                      |
| Adventuresome | Engaging  | Organized |                      |
| Affable     | Entertaining| Outgoing  |                      |
| Alert       | Enthusiastic|                      | Patient              |
| Appreciative| Experienced |                      | Persistent            |
| Approachable|                      |                      | Personable            |
| Assertive   | Fair        |                      | Pleasant              |
| Attentive   | Faithful    |                      | Polite                |
| Attuned     | Focused     |                      | Practical             |
| Aware       | Forceful    |                      | Prayerful             |
| Balanced    | Generous    |                      | Prepared              |
| Bold        | Gracious    |                      | Principled            |
| Brave       | Grateful    |                      | Productive            |
| Carefree    | Hard-working|                      | Professional           |
| Careful     | Healthy     |                      | Prompt                |
| Caring      | Helpful     |                      | Prudent               |
| Charitable  | Holy        |                      | Realistic             |
| Charming    | Humorous    |                      | Reasonable            |
| Clear-headed|                      |                      | Reflective            |
| Collaborative|                      |                      | Reliable              |
| Committed   | Idealistic  |                      | Reserved              |
| Communicative| Ignatian  |                      | Reserved              |
| Compassionate| Imaginative|                      | Respectful            |
| Competent   | Industrious |                      | Responsible           |
| Confident   | Informed    |                      | Responsive             |
| Considerate | Insightful  |                      | Sensitive              |
| Consistent  | Insistent  |                      | Skilled               |
| Contemplative| Inspiring  |                      | Sociable              |
| Cooperative | Intelligent|                      | Spiritual             |
| Creative    | Involved    |                      | Stimulating           |
| Daring      | Judicious   |                      | Supportive            |
| Decisive    | Just        |                      | Sympathetic           |
| Dedicated   | Kind        |                      | Thoughtful            |
| Demanding   | Knowledgeable|                    | Tireless              |
| Dependable  |            |                      | Trusting              |
| Determined  |            |                      |                      |
| Devoted     |            |                      |                      |
| Discerning  | Learned     |                      | Understanding          |
| Disciplined | Logical     |                      | Visionary             |
| Dynamic     | Loving      |                      |                      |
| Effective   | Mature      |                      |                      |
| Efficient   | Motivated   |                      |                      |
|            | Warm        |                      |                      |
Wise
Witty
Qualities for a President of a Jesuit Secondary School

The following description and list of qualities for a person assuming the role of president in a Jesuit school was done by the Commission of Assistants to the Provincials for Education (CAPE, October 1989). The list contains worthwhile material that could be used to construct an evaluative instrument for the position of President.

The role of the director is that of an apostolic leader. The role is vital in providing inspiration, in the development of a common vision and in preserving unity within the educational community. Since the world-view of Ignatius is the basis on which a common vision is built, the director is guided by this world-view and is the one responsible for ensuring that opportunities are provided through which the other members of the community can come to a greater understanding of this world-view and its applications to education. In addition to this role of inspiration, the director remains ultimately responsible for the execution of the basic educational policy of the school and for the distinctively Jesuit nature of this education. (Go Forth and Teach: The Characteristics of Jesuit Education, # 139.)

1. Authentic Role Model
   ◊ a person with a perceived personal and professional commitment to Gospel values in the Catholic tradition
   ◊ a person who lives out his/her values
   ◊ a professional with a sound educational philosophy
   ◊ a person who is open to growth and learning
   ◊ a person who is healthy and cares for self
   ◊ a person of compassion and pastoral sensitivity

2. Spiritual Commitment
   ◊ a person willing to develop an experiential familiarity with Ignatian spirituality and discernment
   ◊ a person of vision and faith who operates from a religious value system
   ◊ a participating Catholic who accepts the Church’s mission
   ◊ a person willing to serve as the animator of what is Jesuit and Catholic in the school

3. Leadership
   ◊ an effective communicator with proven ability to communicate the Jesuit educational vision to broad and diverse publics
   ◊ a person with proven interpersonal skills
   ◊ a person who inspires community building
   ◊ a person with proven administrative abilities
   ◊ a person with public relations skills
   ◊ a person who is able to fund-raise and willing to ask for money
◊ a person willing to be responsible for the vision
4. **Management**
   ◊ a person who understands the administrative process
   ◊ a person who can build and lead a team
   ◊ a person with proven management skills
   ◊ a person who is willing to delegate power and responsibility to others
   ◊ a person who understands financial processes
   ◊ a person who is collaborative
   ◊ a person who is able to generate and allocate resources

5. **Insures Tradition**
   ◊ a person who is loyal to the structure and philosophy of the school as an institution
   ◊ a person willing to be accountable to the Society of Jesus through Provincial and national and international structures
   ◊ a person committed to Jesuit sponsorship of the school
   ◊ a person accountable to the Board of Trustees
   ◊ a person who demands regular evaluation
   ◊ a person willing to educate the public for the changes in Jesuit education

6. **Educational Experience**
   ◊ a person with secondary education experience (teacher, administrator)
   ◊ a person with an experience of Jesuit education
   ◊ a person who meets professional standards acceptable to the academic community
   ◊ a person who seeks the position as part of continued professional growth and development
Guiding Questions for Use in Interviewing Candidates for Ignatian Leadership Positions in Jesuit Schools

The following questions were adapted from readings and materials of the Jesuit Secondary School Administrator Program (JSSAP). Some questions may be more appropriate for a specific position, but there are many questions that, with a little modification, can be incorporated into an interview or evaluation process. Questions selected from the list could also be reworked for inclusion into a professional staff development interview for use with a school leader who has been in office for a number of years.

The questions below have been blocked out according to some implicit general themes. You may wish to select one or two questions on a particular theme, or simply pick and choose questions to supplement others that you intend to ask during the interview or use as part of the evaluation process.

1. Tell me about your significant life and work experiences.
2. Why do you want to serve in a position of Jesuit school leadership?
3. What do you consider to be the mission of a Jesuit high school?
4. What is your image of how a leader in a Jesuit high school should carry out that mission?
5. What personal goals and aspirations would you bring to the position? Why are they important to you?
6. What do you hope to learn or gain from being in a leadership position at this school?
7. If you had three principles or priorities that you could be assured would guide all of the teachers, staff and administrators in your school, what would they be?
8. Do you believe a Jesuit school should be offering something different from other schools? If so, what?
9. What is your image of what should be going on in a Jesuit school?
10. In what specific ways would you see yourself promoting the formational dimension of Jesuit education?
11. Excellence has always been a goal of Jesuit education. What does “excellence” mean to you?
12. What do you feel is the greatest challenge facing Jesuit schools in today’s world? In what ways would you hope to address that challenge as a school leader?
13. What do you consider to be the three most important functions of the Jesuit school leadership position [for which you are interviewing or being evaluated]?
14. In what specific ways will you be able to help teachers [administrators, staff, students]?
Guiding Questions for Use in Interviewing Candidates

15. How would you like your success as a school leader to be judged?
16. What would you consider to be the best use of your time and energy as a school leader?
17. What would you look forward to being the most satisfying dimension of your leadership position?
18. In what ways do you see yourself demonstrating “care and concern for the individual person” (cura personalis, a traditional characteristic of Jesuit education) toward members of the faculty (staff, administration, student body)?
19. How important is it to you that teachers (staff, administrators) like you? How about students?
20. How would you keep in touch with what teachers (staff, administrators) are thinking and feeling?
21. How would you build rapport with teachers (staff, administrators)?
22. What would you say are your three strongest beliefs about teaching and learning? How do you see those beliefs influencing the way in which you would deal with teachers (administrators, students, others)?
23. Would you ever give up on a teacher (staff member or administrator)? If so, under what circumstances?
24. What would you say to a veteran teacher (staff member or administrator) who consistently resists your efforts to introduce improvements into the school?
25. How much do you think you should know about your teachers (staff, administrators)?
26. What are characteristics that you would want to model in your relationship with teachers (staff, other school leaders)?
27. How would you communicate your expectations of teachers (staff, administrators)?
28. What do you think is most important in good delegation?
29. How would you go about selecting people to serve on committees or task forces?
30. How would you go about finding out what your teachers (staff, administrators) do well?
31. How would you hold those directly responsible to you accountable for their performance?
32. If someone came to you wanting to get off one committee in favor of serving on another one in which he or she was more interested, what would be your reaction?
33. What would you do if someone was not satisfactorily carrying out the job you had asked him or her to do?
34. Do you think it is possible to give away too much power and authority? Explain.
35. From your point of view, are position descriptions helpful? How would you go about developing or modifying position descriptions?
36. What do you believe is a good organizational structure for the faculty, staff and administration of a Jesuit high school?
37. What specific means would you use to improve morale and build communications among faculty (staff, administration)?
38. What would you do to overcome the isolation of teachers and promote a healthy sense of community among faculty, staff and administration?

39. What do you believe should be the unifying factor within a Jesuit school? How would you go about fostering unity within the school?

40. What do you believe is the best way to get people to work together?

41. How would you describe a good faculty (staff, administrative) meeting?

42. How would you get teachers (staff, administrators) excited about trying new ideas?

43. How would you get faculty (staff, administrators) interested in working on personal and professional growth and development?

44. In what ways would you encourage and promote the spiritual development of the faculty, staff and administrators?

45. A teacher comes to you because he or she is upset that another teacher runs a noisy class right next door. What would you do?

46. What would you say to a group of teachers who come to you and complain that the school is taking in “less than qualified” students?

47. You are convinced that a particular idea would benefit the school, yet you are sure a majority on the faculty would oppose it. What would you do?

48. A fine teacher of five years experience in the school and highly regarded by faculty and students comes to you and says that while he or she loves teaching there just seems to be something missing that used to be there. The teacher feels that he or she is getting caught in a rut. What would you do?

49. How will you find out what students are thinking? What will you do to make sure that you know what parents, alumni/a and benefactors are thinking?

50. A parent (trustee) calls you on the phone and is quite perturbed about the way in which one of the teachers is treating his or her child. The parent demands to have an appointment with you immediately. What would you do?

51. You have a very outspoken teacher (staff member, administrator) who is well liked by many on the faculty (staff, administration). You feel a constant power struggle going on between the teacher (staff member, administrator) and yourself. What would you do?

52. In what ways do you see yourself giving recognition and support to members of the faculty (staff and administration)?

53. What would you do to help people feel that they belong, that they are a part of the school?

54. When visitors come to the school what characteristics of the school would you want them to experience?

55. How would you help teachers to reflect upon the process of teaching and learning in ways that will enable them to realize more and more what good teaching is about?

56. What would you hope faculty (staff or administration) would be able to say about you as a school leader?

57. In your own decision making what would be always uppermost in your mind by way of a fundamental value or concern?

58. Are there certain things you would be willing to “die for” as a school leader? If so, what are they?
59. In hiring a new teacher (staff member, administrator), what three things would you look for most?

60. What would you do to assure that students are learning to their fullest possible potential?

61. Describe what you would consider to be an effective model of supervision for teachers (staff, administrators) in a Jesuit school.

62. What particularly Ignatian qualities would you like to see reflected in the way students learn?

63. What particularly Ignatian qualities would you like to see reflected in the way people work together at this school?

64. The interplay of Experience, Reflection, and Action is a central dynamic of Ignatian Pedagogy. How would you want to see that dynamic reflected in the classroom (the school)?

65. What would you use to assess the performance of a teacher (staff member or administrator)?

66. What would you depend upon for knowing that the school is reaching its objectives and fulfilling its mission as a Jesuit school?

67. Do you see yourself having a role in helping teachers (staff, administrators) to set goals? If so, how would you go about it?

68. How do you like to go about making an important decision? How would you describe your decision making style?

69. How do you feel about things that seem to take a long time to reach closure?

70. How would others know when you have reached a decision in a particular matter?

71. What role do you see other people having in your decision making?

72. What criteria do you use for involving others in your decision making?

73. How would you describe yourself as a leader?

74. What images or words would you use to talk about yourself as a leader?

75. When you add “Ignatian” as a modifier to “leader,” what does that do for your own image of yourself as leader?

76. What do you think your own style of leadership would be? How will you know if it is an appropriate one?

77. How will you get people to trust you as a leader?

78. What is most appealing to you about being a Jesuit school leader? In this particular school?

79. What do you understand to be the particular needs of this school at this time?

80. In what ways do you think you will be able to respond to those needs?

81. What administrative strengths and organizational skills would you bring to the role of leadership?

82. Knowing your own deficiencies and limitations, where will you need balance and complementarity by others in the school?

83. What do you expect that you would find most difficult about being a school leader here?
84. How well organized are you? In what specific ways are you organized?
85. Do you demand perfection of yourself? Will you expect it of others?
86. What specifically would you look for and expect from the one to whom you will report as school leader?
87. What would you need by way of support in order to do the best job you can in your role?
88. When it comes to seeing that a job gets done, what would you put first, the job or the person?
89. How do you like to be held accountable?
90. How would you like to be evaluated?
The Administrative Leadership Profile Survey (ALPS) was designed to help Jesuit high schools reflect on and evaluate the role and performance of administrative leadership in their institutions. Two versions of ALPS currently exist, one for the role of President and the other for the role of Principal. JSEA publishes the instrument and handles the processing and reporting of results.

Survey items were culled from many sources and are grounded in research findings of what makes for effective leadership and healthy organizations. In addition, ALPS incorporates themes relating to the mission of Jesuit education as treated in documents of the Society of Jesus, particularly *Go Forth and Teach: The Characteristics of Jesuit Education* (1987).

ALPS consists of three sections. The first section is a paper and pencil instrument comprising seventy-two descriptors of what might be expected of someone in the role of a Jesuit high school president or principal. Respondents are asked to indicate the degree of importance they attach to the descriptors as objectives the president or principal of their school should have; respondents are then asked to indicate the extent to which they see the performance of the president or principal meeting the objectives implied by the descriptors. Results show the percentage response on the scales of importance and performance for each descriptor. The final report is organized into an Administrative Leadership Profile.

**Profile of the President**

There are 18 items in the survey for each of the four headings summarized below.

- **Leadership and Personal Maturity:** Communicates a clear sense of direction; calls people to a deeper vision and appreciation of the mission of the school; inspires excellence and cooperation; represents the school favorably to its publics; fosters commitment to and investment in the school; responds maturely to crisis; deals well with personal limitations; is flexible and adaptable; attends to personal, professional and spiritual development.

- **Professional Competence and *Cura Personalis***: Provides for the proficient administration of the school; ensures the institutional integrity and financial well being of the school; oversees the coordination of planning, development and public relations; solicits support graciously; relates and works well with others; is visible and available; helps people feel they are valued members of the school community; shows genuine care and concern for persons.

- **Communications and Decision Making:** Promotes effective communications; keeps attuned to the interests and concerns of the school community; maintains good relations with the Jesuit community; encourages responsible planning and decision making; draws upon the wisdom and expertise of others; makes sound decisions; follows through on implementation; delegates to others; supports subsidiarity.

- **Ignatian Vision in Action:** Models Ignatian ideals in action; challenges the school community to strive for excellence in all dimensions of the school and its educational program; contributes to the Christian character of the school; promotes a leadership of responsible stewardship and apostolic service; inspires confidence and

*Cura personalis is the term used in *Go Forth and Teach: The Characteristics of Jesuit Education* (1987) to capture the rich sense of personal care and concern for each individual that should characterize Jesuit education (43).*
trust; acts with integrity; maintains high standards of performance and conduct; deals with people fairly and justly.

Profile of the Principal

There are 18 items in the survey for each of the four headings summarized below.

Leadership and Personal Maturity: Brings educational vision to school planning; forwards the identity and mission of the school; works to create an atmosphere in which people are motivated to do their best; supports efforts to bring about healthy change; demonstrates flexibility and adaptability; provides resources for faculty and staff development; takes an interest in the total development of students.

Professional Competence and Cura Personalis: Brings organization and efficiency to the running of the school; knows what is going on in the school; ensures supervision is handled in a professional way; exercises fiscal control responsibly and fairly; maintains an atmosphere of trust; shows genuine care and concern for persons; is available to others.

Communications and Decision Making: Maintains effective two-way communications; keeps school community informed; solicits ideas for improving the school; invites the involvement of others in decision making that affects them; consults faculty and staff on matters of their expertise; encourages evaluation and study of areas affecting students and their education.

Ignatian Vision in Action: Promotes an Ignatian vision of education; contributes to the Christian character of the school; promotes the needs of poor and disadvantaged students; works at building a spirit of collaboration and solidarity; treats people with charity and respect; requires accountability of others; implements policy fairly and consistently.

The second section of ALPS invites short written reflections from the respondents that would be useful for the president or principal in setting personal and professional goals for the future. Comments are collated and edited into a report for use with the president or principal.

Profile of the School

The third section of ALPS is the Survey of the Organizational Health of the School. Meant to set a context within which to understand the profile of the president or principal, it is also a paper-pencil instrument, comprising thirty-four statements about the school as an organization. Again using scaled responses, participants in the survey are asked to indicate the extent to which they agree with the statements as reflecting their own experiences and perceptions of the school. Results are reported in terms of percentage responses on the scale used. Responses are organized under ten headings to give a profile of the school's overall organizational health:

There are three statements for each heading, with three exceptions as noted in parentheses.

Goals: School goals are generally known and accepted.
Roles: Roles and responsibilities are clear.
Leadership: The school enjoys effective and supportive leadership.
Management: Good communications exist; policies are administered fairly; authority is clearly delegated.
Consonance: The school's values and goals are carried into action.
Proponence: The school takes initiative in terms of its growth and development.
Personal Synergy (4): People as individuals are active, responsible decision makers.
Systemic Synergy (4): The school as an organization sustains energetic, productive decision-making processes.
Support: People feel they have the support of those in charge.

*Cura personalis is the term used in Go Forth and Teach to capture the rich sense of personal care and concern for each individual that should characterize Jesuit education (43).
Organizational Health (5): People generally have realistic, balanced attitudes about the school.
Reproductions of the Administrative Leadership Profile Survey versions for the President and the Principal appear on the following pages. Included with each version is the Survey of the Organizational Health of the School which is also available separately. JSEA publishes the instrument and provides the services for processing, collating and reporting the results. Contact the JSEA directly for further information and for copies of the actual instrument as well as samples of the reports that can be generated.
ADMINISTRATIVE LEADERSHIP PROFILE SURVEY

— President —

ROLE AND PERFORMANCE OF THE PRESIDENT

ORGANIZATIONAL HEALTH OF THE SCHOOL

The items in this survey have been culled from many sources and are grounded in research findings of what makes for effective administrative leadership and healthy organizations. In addition, the survey incorporates significant themes relating to the mission of Jesuit education as treated in documents of the Society of Jesus, particularly Go Forth and Teach: The Characteristics of Jesuit Education (1987).

SURVEY INFORMATION Please provide the information requested below. Your responses to the survey will be kept confidential. Thank you for your generous cooperation.

Fill in the circle which best represents your current connection with the school:

☐ TRUSTEE ☐ PARENT ☐ FACULTY ☐ SUPPORT STAFF ☐ ADMINISTRATOR ☐ STUDENT ☐ OTHER

Fill in the circle which best represents the number of years of your current connection with the school:

☐ From 0 to 2 years ☐ From 3 to 5 years ☐ From 6 to 10 years ☐ From 11 to 20 years ☐ From 21 years on

Your Name ____________________________

Position ____________________________

School ____________________________

Date _______ CODE _______

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COMMISSION ON RESEARCH & DEVELOPMENT

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# Administrative Leadership Profile Survey

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**Section III**

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**Administrative Leadership Profile Survey**

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**Role and Performance of the President**

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*In this survey you are asked to respond from two perspectives to seventy-two behavioral descriptions. First, using a three-point scale (0 to 2), indicate the degree of **importance** you attach to the described behavior as an objective which you believe the president of your school should have; then, using a five-point scale (0 to 4), indicate the extent to which you see the president's **performance** meeting the objective implied by the described behavior.*

**Instructions**

For each item below first fill in the circle which represents the degree of importance that you attach to the described behavior and then fill in the circle which represents the extent to which you see the president's performance meeting the implied objective. If you have no opinion, do not know or find an item unclear, you may leave it blank.

**Importance**

- 1: **Not Important**
- 2: Somewhat Important
- 3: Important

**Performance**

- 0: Never Does
- 1: Rarely Does
- 2: Sometimes Does
- 3: Regularly Does
- 4: Always

---

1. Is attuned to the interests and concerns of parents.
2. Challenges the school community to strive for excellence in every dimension of Jesuit education.
3. Follows through effectively on decisions.
4. Maintains effective lines of communication with students.
5. Models for others a contemporary living out of Ignatian ideals.
6. Maintains high professional standards of performance and conduct for administrators, faculty and staff.
7. Mediates human conflicts sensitively and fairly.
8. Knows personal limitations and deals effectively with them.
9. Makes sure that personnel are managed with justice and charity.
10. Accepts responsibility for decisions.
11. Shows a loving care and concern for the individual person.
12. Encourages alumni/volunteer loyalty and dedication to the school.
13. Educates the school's public to the mission of the school.
14. Oversees a planned program for maintaining and improving the school plant.
15. Encourages Jesuits to invest in the school as an apostolic work.
16. Supervises the efficient and equitable budgeting of school resources.
17. Keeps the Board of Trustees informed and knowledgeable.
18. Demonstrates flexibility and adaptability.
19. Makes parents and benefactors feel they are valued members of the school community.
20. Seeks personal, professional and spiritual enrichment.
21. Maintains good relations with the religious sponsors of the school.
22. Maintains a spirit of prayer and discernment in decision making.
23. Sees that justice is reached on matters relating to discipline.
24. Keeps on top of significant school issues.
25. Facilitates and supports the principal.
26. Responds maturely and responsibly to crises.
27. Deals with people fairly and justly.
28. Takes positive action to attract quality and diversity to the student body, faculty, staff and administration of the school.
29. Sustains contributions on behalf of the school with grace and conviction.
30. Maintains the financial security and integrity of the school.
31. Demonstrates the ability and willingness to listen.
32. Encourages shared responsibility in planning and decision making.
33. Spends time with many different people for whom the school is a significant part of their lives.
34. Invites regular and systematic evaluation of the President by the Board of Trustees.

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**Administrative Leadership Profile Survey (President Version)**

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70 Ignatian Leadership in Jesuit Schools
### Administrative Leadership Profile Survey

**Role and Performance of the President**

<table>
<thead>
<tr>
<th>Importance</th>
<th>Performance</th>
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<tbody>
<tr>
<td><strong>35.</strong> Motivates people to do their very best and to work effectively together.</td>
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<tr>
<td><strong>36.</strong> Communicates to those associated with the school a clear sense of direction.</td>
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<td><strong>37.</strong> Collaborates in building and sustaining an effective administrative team.</td>
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<td><strong>38.</strong> Contributes by word and example to the Christian atmosphere of the school.</td>
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<td><strong>39.</strong> Keeps alumni informed about each other and the school.</td>
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<tr>
<td><strong>40.</strong> Seeks to deepen alumni commitment to the service of others.</td>
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<tr>
<td><strong>41.</strong> Represents the school favorably in the church, civic, business and education communities.</td>
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<tr>
<td><strong>42.</strong> Works closely with the Board of Trustees and its committees.</td>
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<tr>
<td><strong>43.</strong> Communicates regularly and works closely with the principal.</td>
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<tr>
<td><strong>44.</strong> Succeeds in getting people to invest themselves wholeheartedly in supporting the mission of the school.</td>
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<tr>
<td><strong>45.</strong> Balances the demands of work with the need for rest and relaxation.</td>
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<tr>
<td><strong>46.</strong> Provides for the competent administration of the school.</td>
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<tr>
<td><strong>47.</strong> Seeks to coordinate efforts in planning, development, fund-raising, financial management and public relations.</td>
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<td><strong>48.</strong> Sees to the continued education and development of the Board of Trustees.</td>
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<td><strong>49.</strong> Promotes the goals and activities of the Jesuit Secondary Education Association.</td>
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<tr>
<td><strong>50.</strong> Gives people the freedom and authority to do their jobs well.</td>
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<tr>
<td><strong>51.</strong> Maintains the confidence and trust of administrators, faculty, and staff.</td>
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<tr>
<td><strong>52.</strong> Ensures good communications exist between the administrative offices of the school.</td>
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<tr>
<td><strong>53.</strong> Draws upon the wisdom and expertise of others in making decisions.</td>
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<tr>
<td><strong>54.</strong> Takes time out for prayer, reading and reflection.</td>
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<td><strong>55.</strong> Evaluates the performance of the administration on a systematic basis.</td>
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<tr>
<td><strong>56.</strong> Entrusts the Board of Trustees with broad policy making.</td>
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<tr>
<td><strong>57.</strong> Calls people in the school to deeper vision and purpose.</td>
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<tr>
<td><strong>58.</strong> Expresses gratitude to individuals personally for the work they do and the contribution they make to the school.</td>
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<tr>
<td><strong>59.</strong> Cultivates involvement and support by parents and alumni.</td>
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<tr>
<td><strong>60.</strong> Acts honestly and with integrity.</td>
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<tr>
<td><strong>61.</strong> Makes decisions that advance the mission and philosophy of the school.</td>
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<tr>
<td><strong>62.</strong> Shows genuine interest in the spiritual growth of the school community.</td>
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<tr>
<td><strong>63.</strong> Makes an effort to know members of the faculty and staff.</td>
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<tr>
<td><strong>64.</strong> Supports solidarity in the decision making processes of the school.</td>
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<tr>
<td><strong>65.</strong> Seeks gracious and fair means of cooperation for those working in the school.</td>
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<tr>
<td><strong>66.</strong> Keeps the welfare of students and their learning and growth at the forefront of decision making.</td>
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<tr>
<td><strong>67.</strong> Delegates responsibilities to others according to their talents and interests.</td>
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<tr>
<td><strong>68.</strong> Models a leadership style of apostolic service.</td>
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<tr>
<td><strong>69.</strong> Provides responsible stewardship of the school and its mission by the Board of Trustees in partnership with the school community.</td>
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<tr>
<td><strong>70.</strong> Is visible and available to constituents both inside and outside the school.</td>
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<tr>
<td><strong>71.</strong> Relates and works well with others.</td>
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</tr>
<tr>
<td><strong>72.</strong> Sees that the school regularly evaluates how it is fulfilling its mission.</td>
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</tbody>
</table>

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ADMINISTRATIVE LEADERSHIP PROFILE SURVEY
— ORGANIZATIONAL HEALTH OF THE SCHOOL —

In this survey you are asked to respond to thirty-four statements, using a seven-point scale (-3 to +3) to indicate the extent to which you agree with a statement as representing your perception or experience of the school as a whole.

INSTRUCTIONS: For each item below fill in the circle which represents your level of agreement or disagreement with the statement as representing your perception or experience of the school. If you have no opinion, do not know or find the statement unclear, you may leave it blank.

-3 STRONG DISAGREEMENT -2 BASIC DISAGREEMENT -1 SOME DISAGREEMENT 0 UNCERTAIN +1 SOME AGREEMENT +2 BASIC AGREEMENT +3 STRONG AGREEMENT

PERCEPTION

1. I am comfortable with my role in the school.
   0 0 0 0 0 0 1.
2. Personnel in our school are clearly authorized to do their jobs.
   0 0 0 0 0 0 2.
3. Persons in our school assume initiative.
   0 0 0 0 0 0 3.
4. Our school is in serious trouble.
   0 0 0 0 0 0 4.
5. Our administrators can ask for performance and people respond generously.
   0 0 0 0 0 0 5.
6. People in our school receive support and encouragement when in charge.
   0 0 0 0 0 0 6.
7. We regularly and carefully evaluate our progress as a school.
   0 0 0 0 0 0 7.
8. People in our school feel authorized to make decisions necessary for their work.
   0 0 0 0 0 0 8.
9. We believe in our power as a school to make an impact on our students' lives.
   0 0 0 0 0 0 9.
10. Administrators in our school are comfortable in exercising leadership.
    0 0 0 0 0 0 10.
11. Our school remains true to the best of its traditions.
    0 0 0 0 0 0 11.
12. Our administration examines multiple options before making a decision.
    0 0 0 0 0 0 12.
13. People in our school do their jobs well.
    0 0 0 0 0 0 13.
14. As a school we plan for change, instead of simply reacting to changes initiated by others.
    0 0 0 0 0 0 14.
15. Recognition is often given for a job well done in our school.
    0 0 0 0 0 0 15.
16. Differing kinds of responsibility are clearly communicated within the school.
    0 0 0 0 0 0 16.
17. We know what it will take to achieve our goals.
    0 0 0 0 0 0 17.
18. We are a school community; we are not just individuals doing our own thing.
    0 0 0 0 0 0 18.
19. People who try to change things in our school often get in trouble.
    0 0 0 0 0 0 19.
20. Our administration knows what people are doing and how they are feeling.
    0 0 0 0 0 0 20.
21. People in our school often suggest new ideas to the administration.
    0 0 0 0 0 0 21.
22. There is not trying to improve our school; things will still be done the same old way.
    0 0 0 0 0 0 22.
23. As a school we direct our energies and resources to the achievement of our stated goals.
    0 0 0 0 0 0 23.
24. We are not sure where we are going as a school.
    0 0 0 0 0 0 24.
25. People in our school perceive the authority and resources required to do their jobs.
    0 0 0 0 0 0 25.
26. People in our school participate in regular evaluations of their work and performance.
    0 0 0 0 0 0 26.
27. We have a clear direction as a school.
    0 0 0 0 0 0 27.
28. Our administrators make well-considered decisions affecting the life of the school.
    0 0 0 0 0 0 28.
29. We have school goals that we believe in.
    0 0 0 0 0 0 29.
30. Decisions get translated into action promptly and consistently in our school.
    0 0 0 0 0 0 30.
31. Internal communication in our school is good.
    0 0 0 0 0 0 31.
32. People in our school understand clearly what is expected of them.
    0 0 0 0 0 0 32.
33. Personnel policies are fairly and reasonably administered.
    0 0 0 0 0 0 33.
34. Our deepest values get translated into action in our school.
    0 0 0 0 0 0 34.

Administrative Leadership Profile Survey (President Version) ♦ 71
ADMINISTRATIVE LEADERSHIP PROFILE SURVEY
— REFLECTIONS FOR THE PRESIDENT —

INSTRUCTIONS You are invited to offer your personal reflections for the benefit of the school's president along the lines suggested below. Your comments will be collated with others and edited into a report for use with the President.

Thank you for your kind assistance!

A. I believe the school's president provides effective leadership for our school community by:

B. Strengths that I see the school's president bringing to the job are:

C. In particular, I would like to commend the school's president for:

D. Priorities I would like to see the president help the school address are:

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E. Expectations I have of the school's president which I would like to see met are:

F. I feel the school's president might benefit from special support and assistance with the following:

G. Other:

Sample Copy (Reduced in Size)
ADMINISTRATIVE LEADERSHIP PROFILE SURVEY

― Principal ―

ROLE AND PERFORMANCE OF THE PRINCIPAL

ORGANIZATIONAL HEALTH OF THE SCHOOL

The items in this survey have been culled from many sources and are grounded in research findings of what makes for effective administrative leadership and healthy organizations. In addition, the survey incorporates significant themes relating to the mission of Jesuit education as treated in documents of the Society of Jesus, particularly Go Forth and Teach: The Characteristics of Jesuit Education (1987).

SURVEY INFORMATION

Please provide the information requested below. Your responses to the survey will be kept confidential. Thank you for your generous cooperation.

Fill in the circle which best represents your current connection with the school:

○ TRUSTEE  ○ PARENT  ○ FACULTY  ○ SUPPORT STAFF  ○ ADMINISTRATOR  ○ STUDENT  ○ OTHER ____________

Fill in the circle which best represents the number of years of your current connection with the school:

○ From 0 to 2 years  ○ From 3 to 5 years  ○ From 6 to 10 years  ○ From 11 to 20 years  ○ From 21 years on

Your Name ___________________________ Position ___________________________

School ___________________________ Date ___________ CODE ___________

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### Administrative Leadership Profile Survey

**Role and Performance of the Principal**

In this survey, you are asked to respond from two perspectives to seventy-two behavioral descriptions: first, using a three-point scale (0 to 2), indicate the degree of importance you attach to the described behavior as an objective which you believe the principal of your school should have; then, using a five-point scale (0 to 4), indicate the extent to which you see the principal's performance meeting the objective implied by the described behavior.

**Instructions**

For each item below, first fill in the circle which represents the degree of importance that you attach to the described behavior and then fill in the circle which represents the extent to which you see the principal's performance meeting the implied objective. If you have no opinion, do not know or find an item unclear, you may leave it blank.

<table>
<thead>
<tr>
<th>Importance</th>
<th>Performance</th>
</tr>
</thead>
<tbody>
<tr>
<td>0</td>
<td>Never Does</td>
</tr>
<tr>
<td>1</td>
<td>Rarely Does</td>
</tr>
<tr>
<td>2</td>
<td>Sometimes Does</td>
</tr>
<tr>
<td>3</td>
<td>Regularly Does</td>
</tr>
<tr>
<td>4</td>
<td>Always</td>
</tr>
</tbody>
</table>

1. Encourages open, candid discussion of issues.
2. Maintains effective two-way communications.
3. Follows through on decisions that have been made.
4. Brings a spirit of prayer and discernment to decision making.
5. Promotes the human dignity and the human rights of each person in the school community.
6. Seeks opportunities for personal and professional growth.
7. Works at building a spirit of solidarity in the school community which transcends race, gender, culture, and religion.
8. Invites the involvement of others in decision making that affects them.
9. Is available to others.
10. Maintains an atmosphere of trust.
11. Models a spirit of Christian service in the day-to-day administration of the school.
12. Supports opportunities for the spiritual development of faculty and staff.
13. Knows what is going on in the school.
14. Welcomes constructive criticism.
15. Demonstrates flexibility and adaptability.
16. Solicits ideas and suggestions for improving the school.
17. Helps the school community live out its commitment to the service of faith through the promotion of justice.
18. Keeps in the forefront of planning and decision making what will be best for the students.
19. Reflects maturely and responsibly decisions.
20. Trusts others with responsibility and gives them the authority and support they need.
21. Supports the efforts of others to bring about healthy change.
22. Implements policy with fairness and consistency.
23. Encourages evaluation and study of important areas affecting students and the school.
24. Demonstrates concern for the faculty and staff.
25. Exercises fiscal control responsibly and fairly.
26. Provides clear written communication.
27. Withstands judgment until all the facts are in.
28. Expresses gratitude to individuals personally for what they have done.
29. Provides appropriate programs and resources for faculty and staff development.
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35. Brings an educational vision to planning and decision making.
36. Draws upon the leadership capabilities of others.
37. Challenges the school community to strive for excellence in meeting the needs of the students.
38. Promotes the spiritual, sacramental and liturgical life of the school.
39. Communicates with parents about their students, the school and its activities.
40. Hires good teachers genuinely committed to the philosophy and goals of the school.
41. Evokes enthusiasm and commitment on the part of the faculty.
42. Sets up effective organizational structures to get things done.
43. Delegates responsibilities to others on the basis of their interests and abilities.
44. Works with the faculty on curriculum evaluation and planning.
45. Encourages faculty and staff to take advantage of opportunities for continuous education and personal development.
46. Sees that meetings are organized and well run.
47. Makes sure that personnel supervision is handled in a professional way.
48. Initiates change that moves the school forward in the achievement of its goals.
49. Fosters the religious identity and Christian climate of the school.
50. Works with the faculty and staff to achieve a common sense of purpose.
51. Treats people with charity and respect.
52. Keeps faculty and staff informed.
53. Sees that closure is reached on matters requiring decision.
54. Takes an interest in the intellectual, affective, moral, spiritual and physical development of students.
55. Provides people with constructive feedback on how they are doing.
56. Maintains clear lines of communication with other administrators.
57. Instills in the faculty a spirit of creativity and an enthusiasm for research and experimentation in teaching.
58. Attends school-sponsored events.
59. Works to create an atmosphere in which teachers enjoy their work and are excited about teaching.
60. Addresses faculty and staff concerns openly and fairly.
61. Encourages communication across departments.
62. Advocates the needs of poor and disadvantaged students.
63. Shows personal interest in parents and their children.
64. Seeks creative approaches to solving problems.
65. Requires accountability of others.
66. Consults faculty and staff on matters of their expertise.
67. Makes decisions consistent with the philosophy and goals of the school.
68. Promotes an Ignatian vision of education.
69. Works to create a spirit of collaboration within the school community.
70. Gives praise and recognition generously to individuals deserving it.
71. Shows a caring and concern for students.
72. Works to create an atmosphere in which people are motivated to do their very best.

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Section III Administrative Leadership Profile Survey

ADMINISTRATIVE LEADERSHIP PROFILE SURVEY
ORGANIZATIONAL HEALTH OF THE SCHOOL

In this survey you are asked to respond to thirty-four statements, using a seven-point scale (+3 to -3) to indicate the extent to which you agree with a statement as representing your perception or experience of the school as a whole.

INSTRUCTIONS For each item below fill in the circle which represents your level of agreement or disagreement with the statement as representing your perception or experience of the school. If you have no opinion, do not know or find the statement unclear, you may leave it blank.

-3 STRONG DISAGREEMENT -2 BASIC DISAGREEMENT -1 SOME DISAGREEMENT

0 UNCERTAIN

+1 SOME AGREEMENT +2 BASIC AGREEMENT +3 STRONG AGREEMENT

PERCEPTION

1. I am comfortable with my role in the school.
2. Personnel in our school are clearly authorized to do their jobs.
3. Persons in our school assume initiative.
4. Our school is in serious trouble.
5. Our administrators can ask for performance and people respond generously.
6. People in our school receive support and encouragement from those in charge.
7. We regularly and carefully evaluate our progress as a school.
8. People in our school feel authorized to make the decisions necessary for their work.
9. We believe in our power as a school to make an impact on our students' work.
10. Administrators in our school are comfortable in exercising leadership.
11. Our school remains true to the best of its traditions.
12. Our administration examines multiple options before making a decision.
13. People in our school do their jobs well.
14. As a school we plan for change, instead of simply reacting to changes initiated by others.
15. Recognition is often given for a job well done in our school.
16. Difficulties of responsibility are usually communicated within the school.
17. We know what it will take to achieve our goals.
18. We are not a school community; we are just individuals doing our own thing.
19. People who try to change things in our school often get resistance.
20. Our administration knows what people are doing and how they are feeling.
21. People in our school often suggest new ideas to the administration.
22. There is no trivializing to improve our school; things will still be done the same old way.
23. As a school we direct our energies and resources to the achievement of our stated goals.
24. We are not sure where we are going as a school.
25. People in our school perceive the authority and resources required to do their jobs.
26. People in our school participate in regular evaluations of their work and performance.
27. We have clear direction as a school.
28. Our administration make well-considered decisions affecting the life of the school.
29. We have school goals that we believe in.
30. Decisions get translated into action promptly and consistently in our school.
31. Internal communication in our school is good.
32. People in our school understand clearly what is expected of them.
33. Personal policies are fairly and reasonably administered.
34. Our deepest values get translated into action in our school.

Administrative Leadership Profile Survey (Principal Version) + 77

Ignatian Leadership in Jesuit Schools
ADMINISTRATIVE LEADERSHIP PROFILE SURVEY
— REFLECTIONS FOR THE PRINCIPAL —

INSTRUCTIONS You are invited to offer your personal reflections for the benefit of the school's principal along the lines suggested below. Your comments will be collated with others and edited into a report for use with the Principal. Thank you for your kind assistance!

A. I believe the school's principal provides effective leadership for our school community by:

B. Strengths that I see the school's principal bringing to the job are:

C. In particular, I would like to commend the school's principal for:

D. Priorities I would like to see the principal help the school address are:

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Section III  Administrative Leadership Profile Survey

E. Expectations I have of the school's principal which I would like to see met are:

F. I feel the school's principal might benefit from special support and assistance with the following:

G. Other:

Your Name: ___________________________ Position: ___________________________
School: ___________________________ Date: ___________________________

Administrative Leadership Profile Survey (Principal): 79
This section expands upon several themes highlighting some important principles to be kept in mind when setting up a process for evaluating Ignatian leadership in a Jesuit school:

What’s in a Name? An appreciation of the fears and concerns that surround evaluation processes.

But Why Do It? An argument for regular, systematic evaluation of Ignatian leadership in Jesuit schools.

Concern for Persons Observations on one of the essential characteristics of Jesuit education and its significance in the evaluation process.

Realms and Reams of Expectations A discussion of the impact of expectations upon people in leadership positions.

Understanding Leadership’s Context Some thoughts on a major principle of Ignatian Pedagogy as it applies to leadership evaluation in Jesuit schools.

Learning from Experience An explanation of how the norms of objectivity, validity and unity can help people to reflect upon their experience in evaluating leadership, principles that are very much in line with Ignatian Pedagogy.

The Role of Reflection A discussion of the importance of reflection, particularly in light of Ignatian Pedagogy.

Moving to Action A description of how the dynamic of evaluation moves toward decision and action and the importance of action planning flowing from the evaluation, another major principle of the Ignatian Pedagogical Paradigm.

What’s in a Name?

Evaluation. What does the term conjure up? A “great-job!” pat on the back from an administrator when least expected and needed most? Red hatch marks across the canvas of a brilliantly written essay? Rolling eyes and sagging shoulders from the coach? Shy thumbs up by one of the more trying math students? Maybe other words—such as assessment, review, appraisal—seem far less threatening if not more appealing. Much of the current research on student evaluation favors the term “assessment.” As is often pointed out, “assessment” is derived from the Latin assidere, to sit beside as an assistant judge. The connotation is that in the assessment process one should “sit beside” the learner in order to provide authentic and meaningful feedback for improving his or her learning. Such an attitude and approach fit well with what we are talking about here. Still synonyms like assessment do not enjoy quite the full bodied flavor of evaluation.

In education, regular and systematic evaluation of students and their performance is the norm. Students are constantly under scrutiny. Is Ken doing his homework as carefully as he should? Has Mary Ann improved her writing skills since her last composition? Is Carlos working at his full potential? Does Kim understand what entropy means? All of these are evaluative questions and a legitimate concern, for the progress of students underlies them. But then we expect or at least hope that our students will improve! How these questions are answered may ultimately have powerful implications for the students involved. Quizzes, tests, projects and assignments usually receive some sort of evaluative grade, mark or comment. Evaluation, then, appears to be a normal part of the educational process. Whether it is an appraisal of what needs to be learned, an assessment of how it might best be taught, or an estimation of how much has been learned, evaluation plays a crucial role in teachers’ decision making. Why, then, do we feel a certain reluctance when the desks are turned around and

evaluation is applied to us as teachers and administrators? Are we so good at everything we do as to be beyond all hope of encouragement, much less improvement?

First of all, it may be fairer to say that what some of us feel when we think of being personally and professionally evaluated could be described more accurately as intimidation, if not absolute terror, than reluctance. Psychologically there are natural reasons for our feeling so. Powerful emotions often accompany certain human experiences. It is not unusual to feel a certain amount of anxiety when we are less than clear about what is expected of us. Fear is common enough in the face of the unknown, especially when we are wondering what will become of us when this is over and done with. Sometimes, there may be apprehension or dread about what we suspect will result. We can experience frustration, anger or hopelessness if we sense we are powerless to do anything about what is happening to us. We may feel something akin to shame at our incompetence when we think of ourselves as inefficient or ineffective in areas where we want to be skilled and proficient. We may suffer a little guilt now and then about our failures to do and accomplish what we felt others might or should expect of us.

In addition, some of our reluctance about evaluation as teachers and leaders is reasonably grounded in reality. First of all, many of us have grown up relishing the entrepreneurial business of teaching. We have come to appreciate having almost absolute authority in the work of the classroom. We have learned to earn the regard and respect of our students who are, after all, our raison d’être, and to cherish the privacy that enables us to establish genuine rapport and build authentic relationships with them. If schools are citadels of learning, then classrooms must be preserves of teaching, to be resolutely protected from external threats of academic invasion, administrative infringement and bureaucratic encroachment.

The exclusive province of the teacher can be a particularly touchy subject in the matter of academic supervision. Supervisors are expected to exercise their responsibility, including classroom visitation, for ensuring the quality of the school’s educational program. Faculty, it can be anticipated, will claim some degree of independence as the prerogative of professional educators. Over the years, there have been sensitive attempts to deal with the distinct yet related issues of teacher supervision and faculty development. Clinical supervision, for example, carefully distinguishes summative evaluation, which looks at teacher performance in terms of certain norms and expectations about what is satisfactory teaching, from formative evaluation, which assesses with teachers their progress in achieving specific objectives they have set for themselves. Formative evaluation, which is the approach of clinical and peer supervision, focuses on the personal and professional development of the teacher.

On the other hand we should also be open to experiencing a concatenation of the positive feelings that can come from personal and professional evaluation: gratitude for the gifts and talents we have been able to use, satisfaction that we are doing a good job, happiness about what we have been able to achieve, contentment that we have performed well in demanding situations, reassurance that what we are doing is worthwhile, gratification that others appreciate who we are and what we contribute, joy over our successes, solace from knowing how to work realistically with our strengths and limitations, delight in our own ability to grow and develop, and enthusiasm for the challenges that lie ahead. Ideally, of course, all of us would hope that the end result of the evaluation process will leave us reaffirmed, renewed and revitalized in our vocation as Ignatian leaders and educators.

But Why Do It?

Few of us, if we had our preference, would ask, much less want, to be evaluated. Teachers at heart, we have had enough poor experiences to know that evaluations, among other things, can confine, confound and ultimately condemn. How, then, do we say charitably not only that another person is “good,” but even more, that he or she is
capable of becoming “better,” and that we will support and assist him or her in doing so in whatever practical ways and with whatever concrete means are reasonable and possible. Not to be serious in this regard is to lose sight of the fact that, companions in the ministry of teaching, we are called to work with our God and with one another, in faith, love and service, to bring about the fullness of life that was promised in Jesus Christ. Ignatius stressed “excellence,” not as differentiating “good” from “evil” but as discerning the “greater good.” He proposed that every human decision when divinely inspired is one that always addresses “the more.” Not just what is predictable, reasonable, justifiable and acceptable, but what is the greater good that can be done here and now, in this situation? Modern organizational theory advocates a “proactive” or “proponent” stance in planning and decision making. Nearly 500 years ago, Ignatius advocated a position stronger than any contemporary philosophy of “quality improvement” when he asked, as the measure of all human activity, “What will be for the greater honor and glory of God?” It is a stance that requires not only great humility, but also a ready willingness to be open and vulnerable to the creative power of reflection and evaluation.

Certainly regular evaluation of Ignatian leadership in Jesuit schools is a good and desirable thing to do. As with teachers and staff, so too administrative leaders should benefit from systematic professional review. There are many persuasive arguments for engaging the school community in reflective processes of evaluation.

First, reflection and evaluation are important for human learning and growth. Think of the root meaning of evaluate. “To ascertain or fix the value or worth of” implies considered judgment in doing so. To “value” means to hold dear, to regard highly, to esteem, to appreciate. Value, worth and meaning are relative terms; they are people dependent; they require human reflection and application. What did you or I find worthwhile as the result of our evaluation that we want to keep and nourish? What meaning have we uncovered through our evaluation that we want to expand upon and do more with? What values stand out from our evaluation that we want to promote? What should be the mix and priorities of those values? We learn not simply from doing but by reflecting upon and thinking about what we are doing, why we are doing it, and how well we are doing it. Reflective evaluation helps us better understand and appreciate the meaning, worth and quality of our activity. It gives us an opportunity to bring a calming objectivity and contemplative dimension to the rhythm of our daily life and work. It allows us, moreover, to mark our own progress, to tell our personal history of growth and achievement, to celebrate our accomplishments and successes, to recognize our failures and limitations and to set new goals and direct our energies toward meeting them. Evaluation should be a creative as well as constructive tool for personal growth and renewal.10

Secondly, there is the argument of “professionalism.” By our very vocation in education, we proclaim our belief in certain values and principles of education and we commit ourselves to seeing those values and principles carried out. People are hired to leadership positions with the expectation that they will contribute to the smooth and efficient running of the school. Teachers claim a level of knowledge and skill about what should be taught and how it ought to be taught. It seems logical, then, that we should expect to be held accountable to the standards of education, learning and growth that we profess. One way of being held accountable is through periodic evaluation and scrutiny of what we do, how we do things and even why we do them, especially from the viewpoint of established expectations and in the face of ever-changing needs.

If the logic of the argument of “professionalism” is less than sufficient to convince us of the need for systematic and regular evaluative procedures, we need only be reminded of the reality that we live in an

extraordinarily litigious society. More and more, schools, and professionals within them, will be challenged to demonstrate capable management, responsible supervision, and satisfactory performance in areas of the educational enterprise for which they are accountable. Evaluation that is carefully constructed, conscientiously conducted, consistently employed and well documented—showing due regard for the rights and duties of persons and the institution—can become a significant resource when matters of justice and law come into question. All personnel evaluation should certainly (1) include some systematic form of periodic summative evaluation (2) by a person with supervisory authority (3) that results: (a) in a written agreement to a plan or contract for action (b) toward the achievement of definite goals (c) over a specified period of time (d) with respect to the individual’s job description and performance, and (4) that records what follow up steps are taken, as well as keeps a check on progress that is made.11

From an organizational perspective, evaluation is a means of ensuring the continued quality of the services that we offer in schools. It is a procedure for looking routinely at personnel, programs and resources in order to assess how effectively they are contributing to the achievement of the school’s desired outcomes for its students. The expression “If it ain’t broke, don’t fix it!” has become a popular axiom among many management savants. When said in such a way as to imply “don’t improve it either!”—suggesting that we shouldn’t look too closely at things to see whether they are in good working order—then it defies even the commonsense wisdom of preventive maintenance. Routine inspection, looking over operations with a critical eye, is a reasonable way of ensuring that things are running as they should. Where organizations lack regular, systematic procedures of evaluation that are proactive rather than reactive, they often fall into patterns of crisis management, with managers running over each other’s hoses trying to put out fires. It is bad news when personnel and programs are evaluated solely in reaction to problems. Periodic evaluation encourages responsibility and accountability. It affords the parties involved a formal opportunity to clarify expectations, correct deficiencies, redirect energies and plan for the future.

Concern for Persons

Who are the people involved in the evaluation of Ignatian leadership in Jesuit schools? What should our concerns for them be? First and foremost are the persons whose leadership roles in the school have been selected for evaluation. From the start, we must be extraordinarily generous in the love and care we show them as human beings. For Ignatius, that would extend to assuming an internal attitude of mind that assumes the best of motives on their part, no matter what one’s personal opinions might be about their performance in the job. We need to communicate, moreover, a real appreciation that openness to growth, definitely a prerequisite for undergoing professional evaluation, can also mean painful vulnerability. After all, certain fundamental life and vocation issues—a person’s goals and ambitions, an individual’s self-esteem and credibility with others, a colleague’s job and career—are being touched, even as the evaluation aims at renewed value, worth and meaning for the individual and the institution.

Evaluation should be concerned with encouraging people in positions of leadership in the school to reflect on and take
pride in their accomplishments, to celebrate what they have done, to acknowledge what they enjoy doing most, to appreciate what they do best. It means inviting them to discern, too, where they may feel less than adequate to the challenges of the position, where they would hope to improve their performance, and where they might seek further assistance and support in carrying out their responsibilities. It should help them to set fulfilling yet realistic directions for the use of their time, energy and talent in the future. Finally, the evaluation should be lavish in commending people for their contributions to the leadership of the institution. When recommendations for the future are presented, they should be done with sensitivity, always balancing whatever risks are asked of persons with the support necessary to take them.

Similarly, there should be concern for the people who have been invited to participate in evaluating leadership. Given what we have said already about people’s fears and misgivings when it comes to evaluation, the process should aim to put people at ease as much as possible. This means communicating sincerely and graciously how much their participation means to the institution and that their views will be a valued contribution to the evaluation process. The process should afford people a good experience of evaluation, one in which they feel appropriately involved, suitably listened to, and respectfully treated.

Participants should be confident, moreover, that the extent and level of their knowledge and experience of the person in the leadership have been duly taken into account. It is important, as well, to assure participants that their views—positive and negative—will be held in confidence and even edited, if necessary, to protect their identity. “User friendly” would be a fair and reasonable criterion to have for forms and instruments that participants are asked to complete. Attention to details—including such things as appealing formats, clear instructions, and convenient time savers—will do much toward communicating genuine professional concern and true care for the person.

Once the process is over, there should be plans to thank all those who participated in and contributed to the evaluation. It would be an excellent idea, as well, to communicate—perhaps in some summary form—what the major conclusions of the evaluation were. School people who often find themselves participating voluntarily in a research project rarely get to know the results that they contributed to producing. Such need not be the case for members of Jesuit school constituencies who commit generously of their time and energy to an evaluation that is intended to enhance the Ignatian leadership of their institution.

### Realms and Reams of Expectations

People have expectations of the person whose leadership is being evaluated. Expectations are goals or criteria people have about what one should do and how one should behave. There is a certain power or significance in expectations. Expectations may be “significant” for several reasons. They may be significant expectations because they come from people in the school whose lives and work are touched by the one in the leadership role. They may be significant expectations because they are held by people with authority and influence. They may be significant expectations because they belong to people who enjoy the confidence and favor of others. But they become significant expectations, ultimately, because they make a difference in how the person in leadership acts.

Obviously a person in a leadership position deals with multiple realms of expectations. First among them is the realm of expectations that comes from people who, at times, may seem farthest removed from day-to-day administration and teaching yet their expectations—demanding as they can and legitimately should be—deserve serious attention since as parents they are the primary educators of their children. Next there is the realm of expectations (sometimes widely disparate) that comes from people for whom we may be the chosen or appointed leaders, namely, the other members of the faculty, staff and administration of the school. Here an early task of leadership in-
volves eliciting those expectations (preferably in the process of being invited to consider the position), talking to their legitimacy in light of the school’s mission and philosophy, and then attempting to meet those expectations that seem appropriate given one’s style and abilities, as well as the realities of the situation. Responding favorably to people’s shared expectations by matching them through behavior and performance is an important avenue for establishing trust and credibility as a leader. Thirdly, there is the realm of expectations that rests with those to whom we are accountable in terms of our performance—usually, but not always, the people who brought us into the leadership position but very definitely the people who make decisions about our continued tenure in the position.

People’s expectations, then, are powerful factors that an evaluation process must address. Expectations that are significant in their impact may be strongly yet not commonly held. They may differ considerably among persons within the same group (e.g., teachers) and across constituencies (e.g., students, parents, alumni/ae, benefactors). In addition, expectations are not always articulated, much less clearly understood, by the very people who have them. Expectations can be negative in nature, meaning that sometimes people are surer about what they do not want than they are about what they do want leadership to do. Then, too, there are expectations that operate on the principle of elimination: “No, that’s not what I’m looking for! I can’t say exactly, but I’ll know it when I see it.” These are often the most frustrating type to deal with. There can also be mistaken or “wrong” expectations. These are criteria that people hold up as a measure of leadership which are inappropriate or simply do not fit the position.

An easy example of tensions existing in differing expectations is the community versus corporation dichotomy that can be found sometimes in Jesuit schools. The religious and apostolic mission of Jesuit sponsored schools calls people to commitment and collaboration as communities of Ignatian educators (illustrated, for example, in the ideal that, no matter what our roles may be within the institution, we are meant to come together fundamentally and profoundly as “companions in the ministry of teaching”). Not surprisingly, such a belief evokes expectations of the president, for example, that focus first and foremost on the “pastoral” role of leadership with respect to both the internal and external school communities. At the same time, Jesuit schools also derive their mission from charters of public trust that empower them to function as not-for-profit organizations within a governmental jurisdiction for the purposes of education. The board of trustees and the officers of the corporation are responsible for seeing that the institution fulfills its legal and professional responsibilities. In this context, people’s expectations are likely to center on the business or financial, legal and managerial dimensions of organizational leadership that are very much a part of a president’s responsibility as the chief executive officer. What is considered desirable and appropriate behavior when looking at one aspect of the position, therefore, might not be perceived so strongly when viewed from an altogether different angle. “If you care about people (‘pastorally’) how could you dare fire anybody?” “If you care about people (‘managerially’) how could you dare not fire somebody?” Where does the stress fall but on the one who attempts to be both pastor and manager?

Expectations can be static and predictable; they can be dynamic and surprising. Static expectations tend to be consistent even in their inconsistency. What one individual or group looks for from leadership may vary with the issues but there is still a pattern of predictability in what will be expected. On the other hand, dynamic expectations are forever moving and thus hard to nail down with any precision. Just when you are confident that you know what will be asked of you next, you are surprised by a wholly different set of expectations.

Lastly, there are new or emerging expectations. This is an important area for consideration because here is where reflective evaluation can be particularly helpful. Naturally, circumstances and conditions
change as individuals continue in leadership positions. It is almost a truism that the reason people are brought into leadership becomes the rationale for which they are let go from it. They were hired or appointed to do the jobs or tasks as conceived of then, in a special time of need, with a particular set of circumstances. As times change and circumstances alter, new expectations emerge. Unless there are periodic points of review for redefining people’s expectations of leadership, reevaluating the competencies of the leaders, and re-negotiating organizational structures and position descriptions to suit, more than likely there will be an ever increasing disparity between what leadership does and what others think that leadership ought to be doing.

It should be pointed out that organizational structures deserve periodic evaluation too. Structures are highly rationalized statements of organizational policy. They speak loudly and forcefully of “how we do things around here” and what, therefore, is expected of people within the organization. Structures can also represent outmoded thinking and inefficient doing on the part of the organization. Sometimes they should be adapted in order to accommodate the abilities and talents of skilled administrative leadership. Sometimes they need to be changed in order to deal more effectively with complexities confronting the organization. Too often the fault lies not with ourselves but with the structures we have created. Overextending people and mismatching jobs are common errors when we fail to look periodically at the structures we have in place purportedly to aid and abet people in accomplishing the aims of the organization.

Understanding Leadership’s Context

When it comes to gathering and interpreting the data of the evaluation, naturally context is a significant factor. Just as understanding the context of learning is basic to Ignatian Pedagogy,¹² so too appreciating the context within which an evaluation of Ignatian leadership in a Jesuit school takes place is fundamental. It is difficult to prescind from the institutional health and vitality of the school, much less from one’s own involvement in and concern about its organizational state, in evaluating Ignatian leadership. It is important, therefore, to understand something of the organizational context in which the person in leadership is operating. Helpful background information for those conducting the evaluation might include such things as the results of a recent institutional review, the self-study and visiting committee report for accreditation, a public relations review or feasibility study for fund-raising, the needs assessment portion of a long-range plan, a comprehensive evaluation of the school’s curriculum, or a search committee’s evaluation of the school’s leadership needs.

Out of a sincere Trumanesque belief that the buck has to stop somewhere, we naturally look for whom to blame when the buck does get passed. It sometimes comes as a surprise that not all the variables relating to an institution’s effectiveness and efficiency in accomplishing its mission are under the total control and purview of one person. Like most institutions today, Jesuit schools are complex organizations requiring sophisticated patterns of collaboration, communication and decision making. It takes many discerning people, working cooperatively together in a variety of roles, to ensure that the institution fulfills its mission with distinction. It is a mistake, therefore, to confuse leadership evaluation with organizational evaluation. In fact, steps should be taken to sort out as much as possible organizational issues that arise during a school leadership evaluation so that they can be studied carefully and fed back appropriately into the cycle of institutional evaluation and planning. Sometimes, too, it is desirable to design leadership evaluations to include a separate section that looks at particular dimensions of the organizational context of the school. In the long run, however, there is no substitute for periodic institutional reviews whether they are comprehensive in nature or with a specific focus such as finance,
Without getting into an elaborate treatment of organizational evaluation, it can be pointed out that three basic questions are always relevant: Who are we? What are we trying to do? How are we going about it? The first question looks at the identity and mission of the institution; the second raises the question of institutional vision and goals; the third examines organizational ways and means of making things happen to carry out the institution's mission and vision. The mix and intensity of the three questions will vary depending upon the nature and focus of the assessment that is being made. A comprehensive review should require the organization to look systematically at everything: values and goals; policies and procedures; structures and roles; programs and resources.

Learning from Experience

People's lived experience is the only legitimate starting point of an authentic evaluation process. More than anything else, an evaluation process should help people—those evaluating as well as the person being evaluated—reflect on and learn from experience. For that to happen, evaluation cannot afford to end up as a collection of undifferentiated impressions, untested perceptions and unsubstantiated conclusions. Perhaps the major task of an evaluation process is to search for meaning in the multiplicity and variety of people's experiences and viewpoints. To do so, it must be concerned with objectivity, validity and unity.

First and foremost, the evaluation process should encourage and facilitate people's efforts to objectify their experience. Anyone who has worked with written evaluations (e.g., letters of recommendation) is well aware of how revealing they can be, often more so of the people who wrote them than of the person about whom they were written. We are naturally subjective, involved and affective people. It is not easy to assume the role of a detached, dispassionate observer when I am prejudiced about the person in leadership, embroiled in controversy with the leader, or more than ordinarily invested in the results of the evaluation. From an Ignatian perspective, the ideal would be a stance of "indifference" or impartiality, meaning that I put forth my perceptions as honestly and forthrightly as I can, based on the datum of my own experience, without desiring to direct the outcome of the evaluation one way or another. I should be willing to contribute constructively to the conversation that is the evaluation process, intending only what will be for the greater good.

Objectivity means relating my experience, externalizing it, putting it out there in such a way that others can comprehend its significance and judge its relevancy. There are some "helps" toward objectivity. One is to invite people to reflect on the totality of their experience; in other words, to be inclusive rather than selective in what is reflected upon. Sometimes that also means seeing things in proportion in terms of frequency, duration and intensity. Second is to encourage people to consider the context of circumstances as they interpret personal experiences. Third is to suggest that people offer perceptions they feel confident they can verify with specific examples or concrete illustrations.

It may be unrealistic to expect complete objectivity, but it is reasonable to ask that participants in an evaluation process assume responsibility for the content of their observations and the way in which they offer them. Accountability should be a built-in ingredient of the evaluation process. Admittedly there are arguments for anonymity on surveys, questionnaires and the like (people may, indeed, be fearful for their jobs), still ways can be found to protect people's identity while at the same time enabling them to take ownership for what they say.

It should be cautioned that the process of evaluation with which we are concerned, as is true with all organizational processes, relies for its effectiveness upon a certain degree of psychological health and maturity on the part of those participating in it. Willingness on the part of participants
to accept ownership for what they choose to say in the evaluation process is an important component of objectivity. To the degree that people can put things out publicly for analysis and comparison, the more likely it is that the evaluation process will reach a healthy as well as helpful state of objectivity.

Obviously, objectivity is a precondition for validity. A way to ensure greater validity is to build in reality checks. Ask people to measure what they say over and against the same criteria applied to themselves under similar conditions. Provide ways for participants to test out their perceptions with others. Is there a pattern and consistency in what people observe? Look for ways of using verifiable facts, observable situations, and specific actions that people point to as justification for their conclusions to use as examples and illustrations in the final report. Remember, concreteness and specificity can be as powerful in substantiating the validity of an overwhelmingly favorable evaluation as they can be in strengthening the reality of a severely critical one.

Unity should be a paramount concern in the evaluation process. We are not talking about a cynical unity along the lines of Kurt Masur’s facetious remark that a musical director can be a resounding source of unity for a hopelessly divided orchestra if its members are joined together in harmonious opposition to being under his baton. What we are saying, however, is that the results of an evaluation should not present a scattergram of diverse and idiosyncratic viewpoints. If there is no obvious convergence to be found in the results of the evaluation, then admit to the fact. (Such a confession may well say more about what leadership needs to do than anything else.) In any case, the important thing is to look for useful patterns that appear throughout the evaluation. Where do constituencies come together in their perceptions? What does the school community as a whole seem to be saying? What consistent threads appear in the observations made about the leader’s performance? What can we agree upon as priority issues—positive and negative—that should be communicated to the one who has been evaluated? What items deserve little or no attention? Does any one thing stand out that deserves to be the organizing principle of the final report? Serious attention to such matters as objectivity, validity and unity in the evaluation process gives further assurance to the belief that there is much we can learn from experience.

The Role of Reflection

What is particularly challenging about evaluation is the dynamic role of reflection in the process. The writings of Donald Schön and his contemporaries underscore for educators like ourselves and other professionals the critical importance of reflective thinking in our work. Schön talks about reflection on action as stepping back and thoughtfully examining what has happened, in much the same way we have talked about evaluation thus far. He speaks about reflection in action, though, as something more. It is a habitual frame of mind that informs and shapes every present action; it continually studies what is going on now with a view to deciding what best might be done next.

Interestingly, reflection in action has a very familiar ring about it. In the middle of the 16th century, with the blessing of Pope Paul III, Ignatius of Loyola and his companions founded an apostolic company whose fundamental way of life was to be one of contemplation in action, where work would so inform their prayer, and contemplation would so infuse their work that their lives would become prayer, and they would enjoy the grace of finding God in all things and in every action. Jerome Nadal wrote of Ignatius that “he was a contemplative in the midst of work (simul in actione contemplativus), or to use his favorite expression: he was able to find God in all things.”

14MHSI, Mon. Nadal IV, 651 f. Thomas Clancy remarks about Nadal, “we see how the man closest to Ignatius conceived the grace of the Jesuit vocation to be participation in the grace of Ignatius.” He continues to explain by quoting Ribadenera: “Ignatius did not want the members of the Society to find God only in prayer but in all
\textit{Ignatian Pedagogy: A Practical Approach} is the companion volume to \textit{The Characteristics of Jesuit Education}.\footnote{Ignatian Pedagogy: A Practical Approach (Rome: Society of Jesus, 1993).} Picking up where the latter document leaves off, it elaborates a model of teaching for Jesuit schools that stresses the dynamic interplay of experience, reflection, and action and that emphasizes the roles of context and evaluation in the teaching-learning process. Central to the paradigm is the introduction from Ignatius’ \textit{Spiritual Exercises} of the role of reflection:

A fundamental dynamic of the \textit{Spiritual Exercises} of Ignatius is the continual call to reflect upon the entirety of one’s experience in prayer in order to discern where the Spirit of God is leading. Ignatius urges reflection on human experience as an essential means of validating its authenticity, because without prudent reflection delusion readily becomes possible and without careful reflection the significance of one’s experience may be neglected or trivialized. Only after adequate reflection on experience and interior appropriation of the meaning and implications of what one studies can one proceed freely and confidently toward choosing appropriate courses of action that foster the integral growth of oneself as a human being. Hence, reflection becomes a pivotal point for Ignatius in the movement from experience to action, so much so that he consigns to the director or guide of persons engaged in the \textit{Spiritual Exercises} primary responsibility for facilitating their progress in reflection. (#25)

Careful not to demand what might be beyond the means of an individual, Ignatius specifies very early in the \textit{Spiritual Exercises} that “a person who wants to get some instruction and reach a certain level of peace of soul can be given the Particular Examen, and then the General Examen.”\footnote{The \textit{Spiritual Exercises of Saint Ignatius}, translated by George E. Ganss, S.J. (St. Louis: The Institute of Jesuit Sources, 1992). The Particular and General conscience are rather strong exercises of reflection in their own right. Ignatius himself called for an assessment twice daily of what one has done, is doing, and will do for Christ. Before he even lays out the first set of exercises, Ignatius spends nearly twenty paragraphs on the process of self-examination and reflection. While admittedly the passages concentrate on sinful transgressions, they are not intentionally negative, but rather are meant to “purify the soul and aid us to improve our confessions.” (32) As might be expected, Ignatius asks us throughout the \textit{Spiritual Exercises} to reflect on how our thoughts, words and actions conform to God’s incarnate love for us. One way of understanding Ignatius’ special contribution to the development of Christian spirituality is to see him leading ordinary persons like ourselves, by means of the \textit{Spiritual Exercises}, to ask God for the desire to live a better life, to see Jesus as a model of human life at its best, and to reflect upon our lives in terms of what is the greater good.

Simply put, the role of the retreat director in the \textit{Spiritual Exercises} is to provide the encouragement and support that will enable persons making them to reflect prayerfully on their lives in light of what God has done for them and to listen for what God is calling them to do now. In the \textit{Spiritual Exercises}, we are invited to leave no attitude, thought, feeling or action unexamined. Ignatius was keenly aware of and sensitive to the difficulties of worthwhile self-reflection and productive self-examination. He had a genius for calling people to face reality, especially as revealed through one’s multiple emotional and spiritual reactions to the present moment. Ignatius was quite capable of putting a soul’s feet to the fire, so to speak, and yet doing so with phenomenal understanding and compassion. He also created, for the benefit of the Jesuit Order and its governance, a systematic process and demanding pattern of personal, community and institutional evaluation.

\begin{flushright}
Examens differ in the focus that an examination of conscience takes.
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There are many commentaries on the *Spiritual Exercises* and this is not the place to summarize and critique them. One point of view, though, which underscores our concern about developing a practice of reflection in evaluation, is that Ignatius sought to help others grow in the freedom to respond to God's call, not just in the complex choice of lifelong commitments, but also through the ordinary decisions of daily life. How else does one understand *magis* or the “greater good” except as a constant reminder that God abides in our world and works through us to bring all of creation to ultimate fullness? We are called, therefore, to find God in all things and in every action, to seek excellence in all that we do, and to find in and through that very striving the wholeness and holiness for which we were created.

**Moving to Action**

There are a few other principles of evaluation that it might be helpful to review. Evaluation is a dynamic activity; it naturally tends to go somewhere, to move forward toward some further action. It is both the conclusion and the new start of the Synergy Cycle of organizational decision making that has four major activities: EVALUATION, RECOMMENDATION, DECISION and ACTION (see [Error! Reference source not found.], p. [Error! Bookmark not defined.]). Evaluation is the activity which an organization initiates as part of a decision making process to generate, sustain and renew organizational energy and commitment to policies, programs and procedures that will further its mission. By initiating a formal evaluation of what may be an ongoing or completed action (or situation), the organization introduces a dynamic that will naturally call for a judgment about what should happen with respect to that action (or situation). It opens up and gives impetus, therefore, to the activity of recommendation, a process concerned with developing alternative possibilities about where to go and what to do as a result of the evaluation. Decision is the activity of attempting to coalesce organizational energy into a formal commitment to a course of action. Once the decision has been implemented and the resulting action is under way, the cycle of decision making is complete (see diagram below). Because it starts a momentum for decision making, evaluation is a pivotal activity. Saying “we're going to look at this,” raises people’s enthusiasm or anxiety about where it will go and what will happen.

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**Figure 1 – Synergy Cycle of Organizational Decision Making**

It is helpful, therefore, to realize that there are three critical questions that should be asked in order to conclude the activity of evaluation itself and move on to recommen-
dation. Each question should be addressed positively, forcefully and honestly: (1) “Is this the way we see it?” (2) “How do we feel about it?” and “Do we need to do anything more?” (3) “Do we want to do anything?” The first question—“Is this the way we see it?”—means looking at the data produced by the evaluation and reaching some conclusion about what it says. In the evaluation of leadership in Jesuit schools, it is the point where people reflect on the data that have been gathered in order to formulate a picture that best describes the individual’s performance in the position. It is also the point in a feedback session with the individual where discussion might take the form of a dialogue such as: “This is the way we see your performance in the position. Do you see it this way? If not, how do you see it? What has led us to seeing it the way we do? Can you understand how we might see it the way we do? To what extent can we appreciate how you might see it differently?”

The second question—“How do we feel about it? Do we need to do anything more?”—deals with how people feel about the condition or situation as it has been described. Here it is a matter of affective as well as intellectual appreciation for what the results of the evaluation are saying. In the evaluation of Jesuit school leadership, it is the stage where people are called upon to assume moral as well as intellectual ownership of and responsibility for their evaluation. In the continuing dialogue with the individual in the leadership role, it involves questions such as: “How do you feel about our evaluation of your performance? How do we feel about the way you see it? Is it okay for things to continue as they are (if so, then nothing further needs to happen) or do we need to do make some changes?”

The third question—“Do we want to do anything?”—talks to the need of getting people’s commitment to doing something as a result of the evaluation. It is the critical juncture between evaluation and the subsequent activity of recommendation. If it is not answered in the affirmative there is little reason to expect much more to happen. This is the opportunity for people to describe a picture of how they would like the situation to be different in the future. Talking specifically about an individual’s leadership role, it would involve working with the person to create a desirable image of his or her future performance in the position, for example: “What image would you like to have of yourself in the position? What would make the position more satisfying (productive, manageable, energizing, workable, interesting) for you?” and then translating the image of how we would like it to be into goals. The next step would be to reach agreement on the goals and the time frame for their accomplishment (making sure the individual is committed to the goals) and then to lay out specific steps toward meeting the goals. It is important that the person develop definite workable strategies for achieving the goal(s) committed to, either evolving the strategies alone, with whatever occasional assistance may be needed, or with direct coaching and help. Another factor is making sure to figure out what support mechanisms the person will need to assure progress on his or her part.
Lastly, it is highly desirable to establish a plan for follow up, a definite period in which to evaluate progress over and against the goals. The underlying principle here is that people should be given time and space to work on professional growth and improvement without feeling that they are continually caught in an evaluation process. Hence the evaluation process itself needs to have a formal end so as to free people up to experiment with new work attitudes and changed patterns of behavior. Above all, the approaches used should be developmental, stressing values and goals for the future, emphasizing possibilities that are choice oriented. In other words, efforts should be directed toward keeping the evaluation process proactive rather than reactive.

The Synergy Cycle itself can be viewed as a tool for facilitating the interplay of experience, reflection and action described already as a dynamic characteristic of Ignatian Pedagogy (see Figure 2 – Synergy Cycle and Ignatian Pedagogical Paradigm, p. 92). Bringing a past or present action under evaluative scrutiny at the start of decision making ensures that it will be grounded in the datum of lived experience. Not only do we learn by reflecting on our past and current actions, but we need to reflect, too, on the future we want to shape for ourselves and our organization. Developing recommendations about where to go and how to get there calls for forward looking reflection, reflection that is future as well as action oriented. As our reflection expands outward to the future it should continue to maintain, at the same time, an inward connection to the depth of meaning and value that has come from what past experience has taught us. Making the decision should be an impetus for action, resulting in an expansion of experience that, in turn, naturally leads to another reflective round in the continuing cycle of Evaluation, Recommendation, Decision and Action.

**Summary of Principles**

In summary, then, there are several general principles that should be kept in mind in formulating a process for evaluating Ignatian leadership in a Jesuit school:

1. Every effort should be made to establish a positive, constructive environment for evaluation. People, in general, tend to approach any form of personnel evaluation with a degree of skepticism and more than an modicum of fear and trepidation.

2. Sound, regular systems of evaluation should be the norm rather than the exception in Jesuit schools. Evaluation
procedures should be such that they meet the institution’s obligation to help people grow personally, professionally and spiritually, in order that they may become even more effective in their roles of Ignatian leadership and teaching.

(3) Genuine loving care and concern for the person—including the individual whose leadership is being evaluated and those who are assisting with the evaluation—should characterize the entire process from beginning to end.

(4) Evaluation should be an opportunity for people to clarify their expectations of leadership. It should also help to identify new and emerging expectations that may require further negotiation before they can be formally incorporated into a leader’s position description.

(5) Evaluation should take into account the organizational context of leadership. The results of organizational reviews that look at basic questions touching the institution’s life (such as “Who are we called to be? What is our mission? How are we fulfilling it?”) are vital for properly understanding and interpreting the results of a leadership evaluation.

(6) For evaluation to be useful as well as credible its findings must seem reasonably objective, valid and consistent. People should be accountable for the perceptions they offer, meaning that they should be willing to substantiate their viewpoints with concrete illustrations from their own lived experience.

(7) Reflection on experience, a fundamental dynamic of Ignatius’ Spiritual Exercises, should be an integral dimension of the evaluation process.

(8) Evaluation results should enable people to make intelligent recommendations and sound decisions about what future directions and courses of action to take. Evaluation should call persons to commit themselves to a plan of action that ultimately looks to the greater good to be done in terms of the Jesuit school’s mission to form young men and women of competence, conscience and compassion.
APPENDIX

STRATEGIES FOR HANDLING CRITICISM

If you know you will be going into a difficult meeting, what do you do to prepare for it? What do you do to put yourself in the best possible state so that the meeting will work well for you and the others involved? All of us have strategies for dealing with stressful situations and their aftermath. Most of us have developed tried and true methods that we use in the many different contexts of our lives to help us through uncomfortable circumstances. A personnel evaluation session could certainly qualify as one such occasion where a positive frame of mind would be particularly desirable. We know, moreover, that communication stands a far better chance of being effective when the parties involved feel personally resourceful. This section presents two strategies consisting of a set of exercises adapted from Neuro-Linguistic Programming.¹ The first strategy for handling criticism, Circle of Excellence, gives people an easy way of creating a powerful state of personal resourcefulness which, once identified and established for themselves, they can readily move into whenever they choose, particularly when confronted with difficult and challenging situations.

After you have been in a difficult situation in which you were criticized or verbally attacked, what do you do to deal with the situation internally? How do you put the situation behind you constructively so that you can move forward? Again we all have strategies for doing so. The second strategy presented here, called Responding to Criticism, offers people a method for distancing themselves from the criticism that they have received so that they can better objectify the criticism and choose how they will respond to it. It is an extraordinarily beneficial strategy because it helps one move from a reactive response of "What do they mean by that?!" to a proactive stance of "What do I want to do about that?"

¹Neuro-Linguistic Programming (NLP) combines psychological and linguistic techniques to create a model for achieving effective patterns of communications.
CREATING A RESOURCEFUL STATE
— CIRCLE OF EXCELLENCE —

The Circle of Excellence is a technique to help you develop a resourceful physiological and psychological state when you are about to meet a particularly challenging situation (e.g., a public appearance, a sport’s contest, a health crisis, a final exam, a personal confrontation). The presupposition of the exercise is that the outcome of the particular situation that you face will more likely be positive when you are prepared to act out of a resourceful state.

For you as leader, the Circle of Excellence described here can be an invaluable tool for maintaining a positive, resourceful state as you approach situations in which you have to communicate with less than receptive individuals (e.g., difficult students, anxious parents, upset faculty members, or exhausted administrators).

The steps listed below are designed to help you develop an initial, personal circle of excellence for dealing with situations that you might come across during the course of a day, week, semester, or school year. Having a resource state that you can easily move into can be particularly helpful in dealing with the feedback that you receive at the conclusion of an evaluation of your leadership.

Steps in Developing a Circle of Excellence

1. **Identify the context for a circle of excellence.** When and where do you foresee that you may need to be in a particularly resourceful state? What characteristics would describe that resourceful state for you? (If you are assisting someone else in developing a Circle of Excellence, this can be done without your having to know the individual’s context.)

2. **Develop a state of excellence.** Remember a time that you had the resources that you would like to characterize your Circle of Excellence. You may need to spend some time recalling specific situations where you functioned at your absolute best in order to find all the particular resources you would like to have with you in your resourceful state. You may need to bring together a variety of disparate resources for your circle of excellence. You may actually find some of these resources from other areas of your life besides school.

   Check your own physiology (you may wish to do this by standing in front of a mirror so that you can check your own physiology) to make sure it is a "resource" physiology. Resource physiologies for most people are displayed by uplifted facial muscles and an uplifted upper body. Sagging shoulders and a slouched body are usually not signs of a state of excellence. If you are in doubt about your current resource state, find another example of resourcefulness and/or success from another context such as family, professional meetings, sports, etc., and use this as a point of comparison.

3. **Project a circle on the floor.** With your mind’s eye, project a circle on the floor in front of you. (You may even want to make the circle your favorite color.) Recall all those resources for excellence that you developed in Step 2. Now, physically step into the circle you have projected on the floor, bringing with you as you do so all those resources you desire to have in the future. Stay in the circle for a few moments seeing, hearing, and feeling yourself with all these personal resources. Try actually to see, hear, and feel yourself in this resourceful state and allow its power to grow and deepen as you stand within your circle. You may wish to check to see if you want other resources with you in addition to those you have already considered.

4. **Interrupt the pattern.** Now, step out of the circle and do something to distract yourself for the moment and change the situation by looking out the window or thinking of something you have to do later that day, etc.
5. *Repeat* steps 2, 3, 4. It is helpful to repeat steps 2, 3 and 4 several times until you can step into the circle and immediately access a powerful resource state. You want the state of personal resourcefulness to be well connected with your circle.

6. *Future pace* the resource. While thinking of a future situation where you will need these resources, step into the circle and *see*, *hear*, and *feel* what happens. Be sure to check your own physiology at this point.

7. *Repeat* any steps as necessary. If necessary, repeat steps or include additional resources by finding other examples from your life, or by using examples from other people’s lives (e.g. another leader whom you admire for a particular quality).

Once you have developed an initial Circle of Excellence, you can continue to develop and refine it by repeating these steps whenever you wish. Afterwards, to prepare yourself for circumstances (or even when you suddenly find yourself in the situation) where you want to be in an especially resourceful state, simply project your Circle of Excellence and step into it. You may want to develop circles of excellence for different situations. You may even wish to designate a particular place or chair in your office that is in the middle of your Circle of Excellence so that whenever you are there you will find yourself immediately in a resourceful state.
RESPONDING TO CRITICISM

Inevitably, criticism comes with the role of being a leader. If by some quirk of fate, it has been absent thus far from your life, you should consider yourself specially blessed. Criticism comes from different people and in different ways. How you respond to it is the key. Criticism and how you deal with it can affect your own self-image.

Outlined below is a strategy for Responding to Criticism. The technique described will help you take criticism that you receive and objectify so that you can learn from it and choose how you want to respond to it.

Associated and Dissociated

There are two ways to experience a past event, either as associated with it or as dissociated from it. The associated way of experiencing an event in past time is similar to reliving a role in a movie or play in which you are intensely involved with the characters, plot and emotional undertones. This is called being “associated.” When you feel the sharp sting of criticism, you are likely associated with the criticism you are receiving and therefore re-experience all the emotions and feelings of the event in question as if it were (and in fact it is) being relived.

Another way to experience a past event is from a dissociated perspective. Here the point of view is much like that of a movie camera recording the scene. You pull back from the scene as the camera does and observe all that is occurring, not just what is happening immediately to you. This is called “dissociated” or “disassociated” experience. This particular strategy for Responding to Criticism is based upon an ability to dissociate yourself from the criticism, thereby helping to objectify what is happening. In fact the technique involves a double dissociation in which you watch yourself watching a movie of yourself in action. For example, imagine that you are in the projection room of a movie theater. From there you can actually watch yourself, sitting comfortably in your favorite seat down in the auditorium of the theater, viewing on the screen a film in which you play a role. That is not quite as complicated as it may seem at first although it may require some practice before you can carry out the exercise with some ease. Essentially you are distancing yourself from the events that are being played on the screen. It is the dynamic of dissociating which makes this strategy for Responding to Criticism a particularly powerful technique.

Steps in Responding to Criticism

1. **See yourself at a distance.** First of all, with your imagination see yourself out there somewhere at a distance from yourself. The you out there (like the person sitting in the auditorium of the theater) is about to learn a new way of responding to criticism. Since you out there is some distance removed from you here (the person up in the projection booth), any feelings about being criticized will be out there in front of you as well. Another way to do this is to imagine yourself sitting comfortably and securely in your favorite chair from which you can watch you out there through a window of Plexiglas. You can see and hear through this secure shield which serves as a protective barrier.

2. **See yourself being criticized.** You out there (in the auditorium) is about to be criticized. Watch and listen carefully as you out there is being criticized. Make sure that you out there remains in a resourceful state while he or she is being criticized.

3. **See yourself picturing the meaning of the criticism.** Now watch you out there as he or she makes a movie of the meaning of the criticism that he or she has received and projects it on the screen. Make this movie small and far enough away so that the you out there can comfortably watch it, feeling resourceful, perhaps with a tinge of curiosity.

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1Adapted from Connirae and Steve Andreas, *Heart of the Mind* (Moab, UT: Real People Press, 1991).
Notice whether you out there can make a complete picture of what the person means by his or her criticism. If your picture is fuzzy or incomplete, watch while you out there asks the person questions, until there is a complete picture of the criticism. Questions such as, “What specifically did I do?” or “How specifically did I do such and such?” should help to clarify the picture.

4. Decide what you think. When you have all of the information and while you are still feeling resourceful, you are in an excellent position to decide what portion of the criticism you out there agrees with, and what part you out there may have other opinions about. An easy way to do this is to have you out there compare the movie he or she just made of what the criticism means with your own remembered movie of the same event.

Watch as you out there compares the two movies. How do they match? This will let you know where you are in agreement with the criticism. How do the two movies differ? Where there is a mismatch between the movies, it will be necessary for you out there to gather more information by asking what it was in what you did and/or how you did it that led the other to criticize you. Check your own version of the events to see if, indeed, that was the meaning that you intended through your actions.

5. Decide on a response. Watch you out there decide what to do by way of responding to the criticism. There is a wide range of possibilities. If there is a total mismatch, you may simply choose to dismiss the criticism. When there are some matches in the content of your memory of the event and the movie that was projected, you out there will want to decide what feedback is legitimate for you in this specific situation. You may wish to carry out any of the following in your imagination:

Let the person on the screen who was criticizing you know that you agree with the criticism. (You out there may or may not wish to apologize.) After an apology (if you out there chooses to make one), you out there may or may not want to let the person know about additional information that explains some of your actions.

You out there may wish to ask the person what would make a difference in how he or she would react if this or a similar situation were to occur again.

You out there may choose to let the person know what you will do differently in the future.

If after gathering information, you out there completely disagrees with the other person, you out there may wish to let him or her know that. You out there may even find such a strong discrepancy that you out there chooses to have no further discussion or to make no response at all.

6. Consider changing future behavior. Ask you out there “Do you want to use the information you took from this criticism to act differently in the future?” If so, then decide what it is you want to change and how and when you will use these new behaviors. Think about similar circumstances that might occur in the future and see, hear and feel yourself using what you have learned from this criticism in that future situation.

7. Repetition. You may want to repeat this technique a number of times. You may especially want to use this with vague and less than constructive criticism such as “You are insensitive” or “You never listen to anyone” in order to find out what you might learn from a situation where the criticism is not specific. (Criticism that is not specific is exceptionally difficult to comprehend.) The key points to keep in mind are:

a. Gather information about the criticism in a dissociated way, always keeping you out there in a resourceful state. Have you out there ask questions that seek specificity: “What specifically did I do?” “How specifically did I do it?”

b. Match or mismatch the content of the out there movie and your memory of the event.

c. Decide on an appropriate response.

d. Use this information for new behaviors and “future pace” (practice) them by imagining yourself using those new behaviors at some point in the future.

8. Incorporate the part of you that learned this new strategy. This may seem to be a peculiar part of the technique, but it is important. You have just watched a part of yourself learn a new way of responding to
criticism in a useful way. Thank that part for being a special resource for you in this way. Let the Plexiglas shield melt away and slowly bring you out there back to you here and re-incorporate that part with you. You may want to reach out literally with your hands and arms in a sign of welcome and acceptance; take all the time you need and use whatever gestures seem appropriate.

You may use this technique for any situations in which you have been or are being criticized. You may even use it for internal self-criticism. Some people switch to this technique as soon as they begin to sense criticism coming. Others use the technique after criticism has occurred. In either case it is an extraordinarily effective strategy for dealing productively with criticism.¹

For those familiar with Jungian personality types, the strategy for Responding to Criticism may seem to be something that people with thinking as their preferred mode of judging would do instinctively. Thinking types may still profit from using this technique although they are naturally disposed toward an objectivity that helps to assimilate what can be beneficially learned from criticism. People with feeling as their preferred judgment function may find this exercise a valuable tool for helping them to respond to criticism positively and constructively since they tend to be more associated with the people and personal values involved in such an interaction. As a rule, feeling types take criticism far more personally than do thinking types.

¹The president of a Jesuit institution of higher education told me that he imagines his alter ego in the form of a country bumpkin perched on his left shoulder. The elfin lad is always quick with advice, feedback and perspective, when asked. It is a humorous picture, indeed, as well as a clever device for dissociating and achieving greater objectivity.