Board Self-Evaluation Guide





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Introduction

Public education today needs progressive school boards to assume the challenging but rewarding leadership roles. It also needs effective superintendents and treasurers to head the administrative team. Educational success is dependent upon a positive working relationship between the board and the chief administrative officer and financial leader it employs.

Among the essential tasks of a school board is the responsibility of setting the district's goals and monitoring its progress toward achieving these goals.

How does the school board track progress toward goals? How does it know if the board and superintendent are fulfilling their roles effectively? One method of assessing their effectiveness is the evaluation process.

There can be little, if any, doubt of the need for the board of education to evaluate itself. Just as boards evaluate the superintendent and treasurer, and expect that administrators will evaluate the employees working for them, boards need to take the time to evaluate themselves.

Evaluation of the board's performance is essential to the success of a school district. Without a well-developed and planned evaluation, progress and goal achievement cannot be measured. An evaluation highlights what is being done effectively. It provides the team — superintendent, treasurer and school board — with the best opportunity to identify strengths. It also provides the mechanism for spotting weakness. Through the evaluation process, improvement is facilitated; the team members are motivated to work for betterment, both of themselves and the school district. Boards revise and update goals as a result of evaluation.

A board needs to set policies and procedures for the evaluation process. A clear message that performance evaluation is important and can make a positive difference will add to the quality of education that takes place in the classroom, hallways and school buses. Everyone needs feedback, which serves as a basis for improved performance.

Rationale for board self-evaluation

Evaluation occurs in your school system for a variety of reasons.

When it comes to many of the district's employees, an evaluation is done because the law requires it. Others view an evaluation as a tool to be used to justify a termination or nonrenewal of an employee. While this may be true, it misses the opportunity to use evaluation as a positive tool.

Evaluation holds each member accountable, fosters better communication, improves decision-making and resolves differences of opinion. It identifies areas where the board works well together, creates positive growth and provides affirmation of a job well done. Areas where improvement is needed also will be identified, but this should not turn into an exercise in blame-fixing or finger-pointing.

Self-evaluation means "the board's careful, recurring comparison of its process (its conduct, its behavior) and products (the outcomes of its work) with what it said would be its process and products. Remember, too, that the purpose of self-evaluation is not so much to tender a report card as to enable the board to maintain and improve the quality of its leadership. This kind of evaluation is not about yesterday, but about tomorrow. Evaluation is only cheapened if it becomes more about inspecting the past than inspiring the future" (Carver, "Board Leadership," Number 10, Nov.-Dec. 1993, pg. 7).

In some states, board evaluation is required by law, but that is not the case in Ohio. So, why evaluate? Because you want accountability. Because you want improvement in your operations. Because you want to do the best you can for your school system and community. This commitment to quality, excellence and local control of the educational system is the real why.

There are several reasons why a board would annually engage itself in this process.

Evaluation:

- holds boards accountable in the same manner boards hold employees accountable;
- allows individual members to reflect on their own and their colleagues' behavior and performance;
- fosters open communication among board members and the superintendent;
- improves decision-making by enhancing understanding of philosophies and goals;
- resolves differences of opinion and challenges false perceptions;
- provides insight into why and how decisions are reached;
- allows new board members the opportunity to understand the process of boardmanship and to get to know their colleagues;
- helps identify personal strengths and weaknesses as well as those of the board as a whole;
- holds boards accountable in their roles as representatives of the public and as communicators with patrons and with local, state and federal policymakers;
- provides a starting point for effective and productive goal setting and long-range planning activities.

Important points

Can board members:

- Tell how the superintendent and board use the district's strategic plan/continuous improvement plan to guide decisions, determine strategic student achievement initiatives and budget allocations to effectively achieve the district's mission and vision?
- Explain how the superintendent and board work together and with various constituents on behalf of student learning?
- Explain how the superintendent and board members monitor student achievement and act on needs pointed out by this monitoring?
- Describe actions taken by the leadership team to serve as advocates for children and public education?
- Articulate what makes this board, superintendent and treasurer a distinguished leadership team?
- Describe how most of the district's constituents view the district's leadership team?
- Produce data that the above statements are supported by evidence of success?

Board self-evaluation: A fitness check for service

Take a few moments to analyze your board, your superintendent, your relationships, your operation, your meetings, your school system and your commitment to educational excellence.

Would your answers to these 30 statements be true or false? Would your board colleagues answer the same as you? Consider discussing one or more of these statements at a board meeting. It would make for positive and substantive conversation. If the answer to a majority of these questions is "false," then your board may be due for an honest self-evaluation. If nothing else, it will provide a baseline for your future progress.

- Our board advocates for students by working to establish strong relationships with families and other community stakeholders.
- Our board has established partnerships with businesses and/or organizations to help promote educational opportunities for our students.
- Relationships between all board members are positive.
- The board's relationship with the superintendent is positive and represents a true partnership.
- The board's relationship with the treasurer is positive and represents a true partnership.
- The board has clear, written policies on community/board relations and behaves in tandem with those policies.
- The board provides opportunities for appropriate participation at meetings by members of the community.
- Conflicts or debates occurring at board meetings never become personal.
- The board welcomes active community involvement in our schools.
- The board cooperates appropriately and positively with members of the media.
- Most board meetings begin and end within a two-hour time frame.
- The board shares information about its decisions with all stakeholders transparently and in a timely manner.
- Annually, the board sets and/or reviews district goals and discusses objectives for itself, the superintendent and treasurer.
- The board has reviewed all district policies within the past three years in order to ensure compliance and accuracy.
- The board relies on its policies as "living documents" by referring to them at board meetings.
- Policymaking and/or approval is the number one priority for our board.
- The board works to provide understandable data to the public related to student achievement.
- The board uses and works from an established annual calendar.
- Board meetings are well-organized and efficient, and discussion is appropriate and substantive.
- All board members come prepared to all board meetings.
- The community and staff know of and agree with district goals and objectives.
- The majority of board members have taken part in professional development in the past year.
- The board has an orientation program in place for new board members.
- The board has an up-to-date Board or Governance Handbook.
- The board has conducted a superintendent and treasurer evaluation within the past year.
- The board links the performance goals and objectives of the superintendent and treasurer to our district goals.
- The board supports open, two-way communication between it and various stakeholder groups.
- The board uses data and evidence to make key decisions.
- The board demonstrates a commitment to continuous improvement through board development activities that promote better teamwork, problem solving and decision-making.
- The board leads in celebrating the achievements of its students and staff members and regularly looks for new ways to promote its district's accomplishments.
- Board members are proud to advocate for public education.

Developing an evaluation process

Developing a formal plan of evaluation may seem like a formidable task; however, boards may be somewhat comforted if they accept the point of view that they are trying to develop a plan that is workable for them as opposed to a search for the "perfect" solution to this problem. Such a perspective also should encourage boards to view the development of the evaluation plan as evolutionary, subject to revision as they have experience with it.

"The specific manner of self-evaluation — the mechanism, if you will — is far less important than (1) being explicit about expectations for board performance and (2) regularly reviewing that performance by any method" (Carver, pg. 1).

Therefore, the effectiveness of evaluation depends not on a particular plan or format but rather on the degree of mutual interest and agreement existing between board members. When this mutual interest is high, parties will develop trust during the evaluation process, as well as a commitment to building a better educational program and a sincere desire for progress. In the absence of such a climate, no plan of evaluation can be expected to contribute significantly to better the schools.

What will you evaluate?

What do you evaluate? You evaluate performance based on criteria that are relevant to you, your board, your school district, your goals and objectives and your future plans.

In order for an evaluation to be effective, the board must know what it is supposed to do. "[E] valuating whether the board is getting its job done is ludicrous without having first said what that job is" (Carver, pg. 2). Individual board members, as well as the board as an entity, must understand their proper roles and responsibilities. For a more thorough discussion of those roles and responsibilities, consult the OSBA publication "Boardmanship."

Once the board has put together its job description, it then must establish goals or performance objectives.

When you sit down to do the evaluation, you will answer two very simple questions: "Are we doing our job?" (refer to your job description) and "Are we doing what we said we would do?" (your goals).

As you examine the process of evaluation and look at various types of instruments and their merits, continue to ask yourself: "What are we evaluating exactly?" Your answer will help you choose one or more models and evaluate the effectiveness of the models you choose.

Here is a list of potential areas that you should consider evaluating. It is not necessary that all these areas be evaluated. Remember, in designing your process, focus on those areas that will be most relevant to you and your board:

- policy development and implementation;
- goal setting and progress toward goals;
- community relations;
- board/superintendent relationships;
- fiscal/budget management;
- media relations;
- decision-making skills;
- long-range planning skills;
- communication skills;
- personnel;
- board member orientation;
- board meeting activities;

- curriculum development and implementation;
- parent awareness and involvement in the education process;
- professional development;
- government relations;
- leadership qualities and effectiveness.

Steps to follow in developing an evaluation process

Steps taken prior to board self-evaluation

- Board sets goals for the school district.
- Board defines the scope of its responsibilities and the responsibilities of the superintendent and treasurer.
- Responsibilities are set forth in policy and provide a basis for developing an evaluation process.

Steps to board self-evaluation

- Recognize the need for board evaluation.
- Decide on the evaluation process to be used.
- Adopt a policy statement which includes what evaluations will accomplish and the evaluation process to be followed.
- Select or develop evaluation instruments.
- Complete a self-evaluation.

Preparing for evaluation

In preparing for the development of an evaluation process, the board should take the time to answer the following questions.

- What is our main purpose in evaluating our performance? Progress toward goals? Support? Understanding training needs? Better staff or community relationships?
- What role will each member have in the evaluation process?
- Do we need additional support or resources to do this evaluation?

Selecting and developing board evaluation instruments

Board evaluation instruments vary in purpose, approach and complexity. As you review various instruments, identify those that appeal to you and are appropriate to the issues facing your board and school district. Don't be afraid to take parts of different evaluation instruments to make your own or to adapt pieces of your superintendent and treasurer evaluation forms that make sense to the board self-evaluation.

Keep in mind that board evaluation should be an ongoing process that occurs annually, if not more frequently. Remember, if board members dislike the process, it either won't get done, or it won't lead to sustained progress. OSBA advocates for a standards-based process and one that is directly linked to the district's goals. Regardless of method, consider the following aspects in your review:

Format

- Are the directions easy to understand and follow?
- Will the answers be easy to understand and/or quantify?
- Are the questions written in a language that can be understood by all members of the board?

Scoring methods

- Is a numeric or word-scoring system used? Which do we prefer? If we use a number system, do we all agree what the numbers mean?
- Does each board member answer for themselves personally and/or for the whole board?

Type of instrument

- Is this instrument too simple or complex for our board?
- Will the board commit the time necessary to use this instrument?
- Does this instrument address what we hope to evaluate?
- Are areas we want to evaluate included in this instrument?
- Are areas we wish to exclude from this evaluation included in this instrument?

Basic characteristics of a board self-evaluation

- Any evaluation instrument should be constructive. The basic assumption is that a school board is capable of
 improvement if the evaluation is carried out systematically with good planning, conscientious follow-through
 and careful assessment of results.
- A board should recognize the difference between school district goals and goals that the board sets for its own performance. Some significant areas for developing school board goals are encompassed within three of the main functions of school board members, which are to serve as:
 - governors of the school district as part of local representative government,
 - ambassadors of the instructional program to explain the nature of the learning program to the community,
 - advocates for the students of the school district with the public generally and in the halls of other local governmental agencies, as well as the state and federal governments.
- The form of the evaluation should be designed to assess as well as develop a plan of improvement. The evaluation instrument can be used to set objectives for board improvement over the coming year.
- Board self-evaluation should not limit itself to those items that appear on the evaluation form. While formal
 evaluation forms encourage discussions, informal comments also have value. These comments can come out of
 the evaluation process or from the community, staff or others. Each judgment should be documented with as
 much supportive evidence as possible.
- Formal evaluation should take place at least once a year at a scheduled time and place and can be done in executive session.
- A composite picture of board strengths and weaknesses is most accurate. Each board member should complete an evaluation form independently of other board members, then the board as a whole should meet to compare and discuss results. Often a facilitator can be very useful in this process.
- When results have been discussed and tabulated, the board should list the objectives it will attempt to accomplish before its next evaluation session.
- The board should devise a process for establishing goals.

The five standards, benchmarks and indicators for board self-evaluation

Just as OSBA advocates for superintendent and treasurer evaluations that are based upon district goals and objectives as well as a broad sets of standards, five standards for board self-evaluation also are endorsed. These standards are aligned with to the National School Boards Association's governance recommendations:

- responsible school district governance;
- communication of and commitment to high expectations;
- creation of districtwide conditions for student and staff success;
- district accountability in all areas;
- engagement of all community members.

Benchmarks, indicators and references

Each standard has a set of benchmarks and key indicators to further define and help translate the standard into practice. The benchmarks identify the knowledge and skills that high-performing boards demonstrate in meeting each standard. The indicators outline questions about what each standard looks like when applied at the local board level.

School board standards

Although school boards have adopted varying governance structures and each district and community is unique, OSBA encourages school boards to put the standards into practice in a way that is appropriate for its district. Not every benchmark and indicator under each standard will apply to all districts. Boards are encouraged to review and discuss the standards and consider passing a resolution to adopt them. Once adopted, the standards may be shared with staff and the community to bring additional clarity to board roles and responsibilities. The standards, in partnership with the district's goals, should be the foundation for board improvement.

By using the board standards and district goals, the board creates a specific and concrete protocol to which all board members agree for self-directed professional development. The results of the school board assessment can be a jumping-off point for further dialogue in a retreat or workshop setting or strategic planning process.

Boards of education who use a formal process for self-assessment and professional development based on standards and high expectations help institutionalize best practices and a positive governance culture in their districts.

Standard 1: Responsible school district governance

- Conduct board and district business in a fair, respectful and responsible manner.
- Ensure the board is accountable and open to the public, including seeking divergent perspectives in its decision making process.
- Respect and advocate mutual understanding of the roles and responsibilities of the board members, superintendent and treasurer.
- Adopt and adhere consistently to policies based on well-researched practices that emphasize a belief that all students can achieve at high levels and support continuous improvement of student achievement.
- Promote healthy relationships by communicating supportively, inspiring, motivating and empowering others and exercising influence in a positive manner.
- Work as an effective and collaborative team.

Standard 2: Communication of and commitment to high expectations

- Articulate the conviction that all students can learn and the belief that student learning can improve regardless
 of existing circumstances or resources.
- Lead the development, articulation and stewardship of a vision of learning, including district mission, goals and specific objectives, that is shared and supported by schools and community.
- Adopt a collaboratively developed district plan focused on learning and achievement outcomes for all students.
- Ensure nonnegotiable goals for student achievement are established and aligned to the district's plan.

Standard 3: Creation of districtwide conditions for student and staff success

- Provide for the safety and security of all students and staff.
- Employ and support quality teachers, administrators and other staff and provide for their professional development.
- Provide for learning essentials, including rigorous curriculum, technology and high-quality facilities.
- Ensure management of the organization, operations and resources for an efficient and effective learning environment.
- Adopt and monitor an annual budget that allocates resources based on the district's vision, goals and priorities for student learning.

Standard 4: District accountability in all areas

- Commit to continuous improvement in student achievement at each school and throughout the district.
- Evaluate the superintendent and treasurer on clear and focused expectations.
- Measure student academic progress and needs based on valid and reliable assessments.

Standard 5: Engagement of all community members

- Collaborate with families and community members, responding to diverse interests and needs, and mobilize community resources.
- Ensure school board and district transparency through a process that is open and accountable.
- Ensure district information and decisions are communicated communitywide.
- Solicit input from staff and a wide spectrum of the community so that a diverse range of interests and perspectives on issues is considered.

Discussion items/considerations

As you consider your board self-evaluation, here are some things that may help prompt thought or discussion. Many of these items will relate to the statements you may have responded to individually or as a group from Chapter 2 of this guidebook.

Use these in tandem with discussion about the standards and your district's goals. For discussion purposes, consider rating yourselves as "needs improvement," "satisfactory," "good" or "excellent" for these items. For those areas or items where you believe you need to make significant improvement, ask yourselves, "What specifically could the board do to make progress here?"

Board/superintendent relations

The board:

- Promptly communicates all expectations, compliments, concerns or criticisms of the school system to the superintendent with the expectation of feedback when appropriate.
- Refrains from infringing on the superintendent's area of administration and follows procedures as agreed upon by the board and superintendent in communicating with staff.
- Refrains from public criticism of the superintendent.
- Encourages the superintendent's participation in professional associations and promotes professional development.
- Provides a clear set of expectations of performance and personal qualities against which the superintendent will be measured periodically.
- Maintains a professional compensation package for the superintendent.

Board meetings

The board:

- Conducts all board meetings efficiently and effectively, pursuant to board policy, and in accordance with Ohio's open meetings laws.
- Provides opportunities for public participation in board meetings.
- Has procedures agreed on between the board and superintendent for developing the agenda and getting materials to board members in advance.
- Makes a sincere effort to be informed on all agenda items prior to meetings.
- Adheres to its adopted code of ethics.

Board/community relations

- Refrains from committing to a position on an issue before all relevant facts are presented.
- Refrains from speaking for the board on issues for which the board has no official position.
- Allows for citizen input through public hearings, advisory committees and other avenues.
- Encourages all stakeholder groups to attend board meetings, and creates agendas that promote interest.
- Supports the president in the role of board spokesperson if stipulated in board policy.
- Has an established procedure for getting information to the public.
- Recognizes that once a decision has been made by the board, the board speaks with one voice, regardless of one's personal agenda.
- Strives to maintain an open dialogue with its local and state governmental leaders.

Board qualities

The board:

- Displays sincere and unselfish interest in public education, which develops and contributes to the growth of students.
- Possesses knowledge of the educational process and the needs of the community.
- Strives to improve boardmanship skills.
- Weighs all decisions in terms of what is best for the students of the school district and doesn't give in to special interest groups.
- Is visible in the community.
- Is independent, open minded and respects the decisions of the individual board members and administrators on various issues.

Personnel relations

The board:

- Has sound personnel policies, including job descriptions.
- Authorizes the employment and assignment of staff members only upon the recommendation of the superintendent.
- Encourages professional growth and increased competency of the staff through beneficial professional development activities.
- Provides appropriate staffing based on the needs of the school district.
- Adopts an annual compensation plan, which draws and/or retains a highly qualified staff.
- Provides for input from school district personnel.

Instructional programs

The board:

- Sets instructional goals.
- Understands the local instructional programs and the basic curriculum goals of the school district.
- Provides a mechanism to continually revise and update the instructional program.
- Keeps abreast of new developments in the curricula content and teaching strategies by participating in conferences and meetings.
- Keeps abreast of timely instructional subjects by reading selected books and periodicals.
- Embraces a belief that all children can learn and achieve at high levels.
- Adopts policies needed to support improvement in student learning and achievement.
- Ensures involvement of a broad base of stakeholders to create shared vision and support key initiatives to improve student learning and achievement.
- Approves comprehensive plans to move the district to improved achievement.
- Allocates funding for and alignment of the resources needed to advance student learning and achievement.
- Has established clear expectations that the superintendent will lead planning initiatives, collaborative efforts and change initiatives for improving student achievement.
- Has established clear expectations that the superintendent will ensure that change initiatives for improving student achievement are occurring throughout the district.

Financial management

- Equates the income and expenditures of the school district in terms of the quality of education that should be provided and the ability of the community to support such a program.
- Takes leadership in suggesting and securing community support for additional financing when necessary.
- Understands the basic principles of school finance, including federal, state and local sources of revenue.
- Provides for public input during the budgetary process.
- Provides formal and informal opportunities for employees to have input during the budgetary process.
- Monitors the financial status of the school district monthly.
- Regularly reviews the suitability of all school facilities.
- Has a long-term plan for the acquisition of sites and construction of new facilities.

Is supportive of the appropriate use of school facilities by responsible public organizations and individuals.

Board/treasurer relations

The board:

- Promptly communicates all expectations, compliments, concerns or criticisms of school finances to the treasurer with the expectation of feedback when appropriate.
- Refrains from infringing on the treasurer's area of administration.
- Refrains from public criticism of the treasurer.
- Encourages the treasurer's participation in professional associations and activities and promotes professional development.

Board professional development

The board:

- Keeps informed by reading current literature.
- Keeps abreast of educational issues by attending education workshops and conferences at the local, state, regional and national levels.
- Seeks to keep fellow members informed of new learning, trends and developments.

Policy development

The board:

- Develops sound policies and maintains an up-to-date organized policy manual, which provides ready access to each policy.
- Cooperatively establishes policies with the administration for the operation of the schools.
- Allows public input into the policy-development process.
- Provides for periodic policy review and revision when appropriate.
- Follows state laws regarding the development of policies and the amendment of policies.

Goal setting and planning

The board:

- Annually establishes clearly identified goals based on the assessed needs of the district.
- Plans and implements appropriate activities to address the needs identified in the board-assessment process.
- Annually reviews and revises the board's long-range plan.
- Sets goals which encourage positive public participation in the schools.
- Adopts a process and timeline for the preparation of the budget.

Media relations

The board:

- Ensures a continuous, planned program of public information about the schools.
- Cooperates with various media for the dissemination of information about the school district.
- Encourages media to attend board meetings by providing adequate space and notice of meetings.
- Provides for the media, through the board spokesperson, adequate explanation of board actions.

Board operations

- Conducts meetings in accordance with accepted rules in an efficient, businesslike manner.
- Has access to the board meeting agenda in a timely manner prior to the board meeting.
- Conducts study sessions, executive sessions and special meetings in accordance with laws and district policies.
- Participates on district committees and in professional associations that serve to meet district goals.
- Maintains adequate internal communication to keep all members informed of needs and issues.
- Completes legal requirements and duties of the board.

Policy

The board:

- Adopts and consistently follows the mission statement and district/board goals.
- Develops and implements long-range plans to guide district operations.
- Works to actively influence legislation which impacts the district.
- Observes the line between policy and administration.

Staff and community

The board:

- Communicates concerns and information to the superintendent.
- Maintains a positive working relationship with the superintendent.
- Communicates appropriately with staff and sets a positive tone for the district.
- Responds to community concerns, questions and complaints.
- Establishes a positive working relationship with the local media.

Personal

- Respects the opinions of other board members.
- Maintains and respects the confidentiality of information.
- Establishes a harmonious working relationship.
- Understands that they have no authority to act on behalf of the board except when they are in a board meeting and may not speak on behalf of the board unless authorized by the board.

Using evaluation results: Developing an action plan

Your board has now completed a self-evaluation, and the results have been discussed and/or scored. Now you are ready to set objectives for improvement. These will be tied to your district's goals, but will represent objectives or work that the board members agree will help the board improve its own operations. These will be things the board will personally accomplish (not items you expect the superintendent or others to accomplish).

Some examples include:

- increasing board visibility in the community;
- conducting more effective board meetings;
- building the spirit of teamwork and trust among members of the board/superintendent team.

Your objectives are the things you want to have happen, each tied to one of the district's broader goals. Write action steps for each objective. These action steps detail the work. Once again, these are actions individual board members or the board as a whole will take.

As the board designs action steps, include who will be responsible for each and when each should occur or be completed. All board members will be responsible for most action steps, but in some cases you may assign the board president or another board member to complete a task.

Next, briefly define how you will assess whether or not you've completed the objective. What will your evidence of success be? When the board's next self-evaluation occurs, you will want to review your action plan. Did you get closer to accomplishing your goals? If so, are there new heights to strive for? If not, are there additional actions you might take?

The following simple outline may help you get started. Use this or a similar outline for each board objective. Workable board objectives will be personal to your board — designed by you as a unit. When they are complete, you may want to keep them in your board handbook or on a bulletin board to remind yourself of commitments and time lines.

Board action planning outline

- District goal:
- Board objective:
- Which of the five standards is this tied to (Chapter 4)?
- Action step (how):
- Accountability (who):
- Timeline (when):
- Evidence of success:

Evaluation and goal-setting calendars

The board should ensure that dates to review or set new district goals, discuss and determine objectives for the board, superintendent and treasurer, monitor progress on objectives (review action plans) and conduct annual evaluation of board, superintendent and treasurer are all on the annual calendar. Many boards find that goal setting is best done in summer, when schedules are less busy and board leadership teams have more time to consider and discuss work and progress. A final board self-evaluation can be conducted in late spring, as the academic year is winding down. It also can lead directly in to new goal setting and evaluation discussions by summer.

Whatever process or calendar that works for your board and is one you can all agree on is the best one.

Suggested calendar for district goal setting and evaluation

Beginning of new evaluation year — July–September

- District goals
- Board objectives
- Superintendent and treasurer objectives

Mid-year formative evaluations — October–March

- Progress on board objectives
- Progress on superintendent and treasurer objectives
- Appropriate adjustments and monitoring

End-of-year evaluation — **April-June**

- Summative board self-evaluation
- Summative superintendent and treasurer evaluation