



Superintendent Evaluation and Board Self-Evaluation

Monterey County Education Leadership Summit

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Governing Responsibility: Setting Direction

Values: "What the district stands for"

Values are the core shared beliefs that guide the district. Values remain relatively stable over time. They set a guideline for establishing district vision and mission statements. They set a "yardstick" against which to assess future district processes and decisions. Examples: excellence, inclusion, creativity, equity, integrity, transparency...

Vision: "The district's preferred future state"

Vision is the description of the future state toward which the governance team and all staff are moving the district.

Properties of a Vision: Inspires to action, student achievement centered (for every student), grounded in the district's values, sets a standard of excellence, easily understood, future oriented, generates energy and enthusiasm.

Mission: "The district's reason for being"

Mission is the description of why the district exists. It describes what the district does for whom.

Properties of a Mission: Purpose of the district, guides development of specific strategies, guides resource allocations, helps prioritize and define critical goals and success indicators.

Status: "Where the district is right now?"

Status is an assessment of how the district is performing right now (a benchmark); why the district is performing the way it is; who is doing what and why. Knowing where the district is now helps define the gap between where we want the district to be and where it is now. It enables us to prioritize needs and to develop goals and strategies in order to move the district forward.

Assessing Status: A SWOT analysis (strengths, weaknesses, opportunities and threats) can be an informative tool for assessing district status and needs. Through discussion of SWOT-generated needs, the district begins to form priorities.

Priorities: "Which among many strong interests are truly the most important?"

Priorities are the current most critical needs of the district. Specific goals and strategies addressing these priorities will have the greatest impact/results on achieving desired district performance improvement.

Possible priority categories: student achievement, student services, budget resource alignment, policy making, human resources, collective bargaining community relations/public involvement, facilities planning and management, school safety technology.

Goals: "What the district will strive to achieve—a result, not a process"

Specific goals are clearly focused on and aligned with the district values, vision, mission and priorities and must be accomplished in order to move the district forward.

Properties of a Goal: Goals begin with action verbs. Goals focus on desired results/outcomes, not the process to get there (that is a strategy). Goals are not activities. Judge the quality of a goal by asking: "What is the evidence this goal is accomplished?" The evidence, or end result, is the goal—not the activity. Do not exceed a maximum number of manageable and "high performance" goals. Goals do not incorporate routine work.

Success Indicators: "How the district will measure and know its level of success"

Success indicators add further clarity to defining the desired results of a goal. They also create a mutually understood and agreed upon expectation when goals are being set by multiple people—the School Board. Success indicators can be used to "set the bar" for expected district performance. They can push the district to higher standards.

Properties of success indicators: They are quantifiable, supported by data; and assessment of success indicator-driven performance forms the basis for objective, qualitative performance assessment. They can represent behavioral changes, program performance, and resource alignment with needs. They describe what the district, board, superintendent, and employees will be "doing" when the district achieves success.

Strategies/Tactics: "Staff developed and driven work done in order to achieve goals/ results"

Strategies are the "tactical" and "operational" means by which goals and success indicators will be achieved. They are developed and implemented by staff using professional skills and judgment. Strategies should not be confused with goals. Goals define "what" and strategies define "how."

Key Points Relating to Superintendent Evaluation

Boards must have agreed upon core district beliefs, a district vision and/or mission, and must know what their priority areas are. Only then, can they effectively evaluate the superintendent.

Superintendent evaluation should be a communications process that serves as a model for district evaluation at all levels. It should be:

- Goal-based. (These should be district goals set mutually by the board and superintendent in priority areas for the coming year and should include Local Control Accountability Plan [LCAP] goals.
- Measurable
- Ongoing
- Collaborative. Working together as a governance team, the board and superintendent should also agree on success indicators for each goal.

In this way, boards use superintendent evaluation as an important leadership tool to focus and align all district efforts, an opportunity for the governance team to reflect and talk about where the district is going, not just this year, but with an eye to the future.

It should:

- provide an opportunity for acknowledging and commending the superintendent's accomplishments;
- support growth of the superintendent and sustained improvement for the district; and,
- if necessary, identify weaknesses or problems that need to be addressed by the superintendent to ensure continuous progress.

CSBA recommends two primary content sources:

- Progress toward district goals/LCAP
 - Identify district goals/LCAP and one or more success indicators for each goal.
- Personal and professional qualities based on the *Superintendent Governance Standards* (see page 8.)

- It's important to focus on progress toward goals, but if boards want to evaluate additional aspects of the superintendent's job performance, the Superintendent Governance Standards are a useful tool.

While goals should be reality-based and thus affordable to achieve, boards should encourage staff to look for creative ways to fund goals and make sure budget priorities support the goals.

Success indicators are the measures that tell you when you have accomplished your district strategic goals. They are tools with which we measure progress. Success indicators should be quantifiable, behavioral changes, support mechanisms or resource shifts. What is important is that they focus on results, not the processes used to get results. The indicators we use to monitor results may vary dramatically from district to district. It is vital that governance teams allow adequate time to discuss and agree what data will tell them a goal has been successfully met.

We strongly recommend that board members use a narrative format for their evaluations. What is written can be brief, but describing one's perspective on performance and accompanying any negative with a recommendation for improvement assures more thoughtful evaluation than simply providing a numerical (e.g., 1-5) or phrase (e.g., clearly outstanding, exceeds expectations, needs improvement) ranking. No matter what format is used to record evaluation, it is very important that the board have a conversation about the reasons behind different members' perspectives and that what is presented to the superintendent is board consensus. While individual points of view are important, the superintendent must respond to the collective agreements of the board and cannot be expected to respond to individual board member expectations.

Sample superintendent evaluation procedure checklist:

Any timelines or specific list of procedures should be based on the understanding that there will be ongoing communications between the board and superintendent throughout the year and regular progress reports from the superintendent to the board. The more formal superintendent evaluation process will add to that ongoing process, not replace it. Frequent communication with the board ensures there will be no surprises in the evaluation process. The annual evaluation is not the place to "spring" major findings or conclusions that were never raised earlier in the year.

- √ Agree on priority areas and with the superintendent, set goals for the coming year that the governance team believes will reasonably move the district toward its long-range vision. Again, the atmosphere should be calm, conversational and invite the superintendent's full participation.

- √ Discuss level of satisfaction with the evaluation methods and instruments used during the current year. Decide whether to modify the evaluation system for next year based on the new goals.
- √ Have the superintendent prepare an evaluation packet for the board that includes a progress report toward district goals, the superintendent's self-evaluation of accomplishments and performance and a review of action taken to address recommendations of the board from the previous year. This is sound practice and the packet can be presented at a pre-appraisal meeting or distributed to board members individually.
- √ Review the contractual agreement between the board and the superintendent. The current contract may be included in the evaluation packet prepared by the superintendent.
- √ Review any board-adopted policies relating to the superintendent's job description or evaluation process.
- √ Review the annual goals.
- √ Individually evaluate progress against these goals using methods and instruments chosen by the board and superintendent as most appropriate for the current year. (How successfully has the superintendent met the expectations? Have there been unforeseen extenuating circumstances we must take into consideration?)

Use the previous evaluation as a baseline. If no previous evaluation exists or if the system being used has fundamentally changed, this year's evaluation will be used as a baseline for future evaluations. In this case, since no comparable evaluation exists and no clear direction may have been given to the system, the board will need to be careful about making judgments.

- √ Decide who will summarize and combine the individual evaluations to create a consensus document and how the document will be formatted. **The evaluation should be a composite of individual board members' opinions, but there should only be one final evaluation representing the board's collective judgment. This is the evaluation to which the superintendent must respond.** The summary evaluation may be a compilation of individual evaluations with all written comments intact or numerical ratings listed, or may record only a group consensus on each area evaluated. This summary document should be distributed to all board members for review and approval. (The superintendent does not receive a copy at this time since the evaluation is still being worked on by the board.)

- √ The board should come together to have a conversation about the consensus document to ensure it accurately reflects the opinion of the board as a whole.
- √ Distribute copies of the completed revised evaluation to the board and superintendent. This is a confidential document.
- √ Meet as a full board with the superintendent to discuss his/ her evaluation. Schedule the evaluation as the only item on the agenda. The meeting should be in closed session unless the superintendent requests that it take place in open session. The final evaluation should adopt a professional tone, noting both successes and areas where improvement is needed, as well as, acknowledging goals that could not be reached due to unforeseen circumstances.
- √ Create an atmosphere that enables the superintendent to express any concerns he or she may have regarding the respective roles and responsibilities of the board and superintendent. The superintendent should not be penalized or threatened for discussing this issue in a frank and open manner with the board at this time.
- √ After the process is complete, review the process and meet to set goals for the coming year.

(Understanding the impact of the board's actions and behaviors on the superintendent's ability to accomplish goals, the board should take collective responsibility for scheduling periodic board self-evaluations. These may not be held in Closed Session.)

Suggested Sequence for Evaluation of the Superintendent

The annual timeline for a superintendent's evaluation will vary from district to district, often based on the initial date of employment. Many districts adopt a schedule which follows the school calendar so progress toward annual goals can be made during a school year. It is important to remember that student achievement information is often not received until the following school year. Districts should create a schedule that meets their specific needs.

Step 1	<ul style="list-style-type: none"> ▪ Governance team finalizes annual goals/LCAP and success indicators for coming year, ensures the budget supports the goals, reviews evaluation procedure and makes recommendations for coming year. It is very important for the governance team to schedule enough time to set future goals in a thoughtful manner. This includes agreeing on success indicators and clarifying board expectations concerning progress reports.
Step 2	<ul style="list-style-type: none"> ▪ Superintendent develops and presents administrative action plan for achieving goals to the board.
Step 3	<ul style="list-style-type: none"> ▪ Superintendent communicates plan to staff and implementation begins.
Step 4	<ul style="list-style-type: none"> ▪ Mid-year, the superintendent reports to and has a discussion with the board on progress toward goals. Additional progress reports may be scheduled as necessary throughout the year.
Step 5	<ul style="list-style-type: none"> ▪ Board and superintendent review specific procedures, timeline and evaluation format for current year's evaluation. ▪ Superintendent prepares and presents evaluation packet for the board that includes superintendent's report on goal achievement, self-evaluation, contract and/or policy language on evaluation. ▪ Board president distributes evaluation forms.

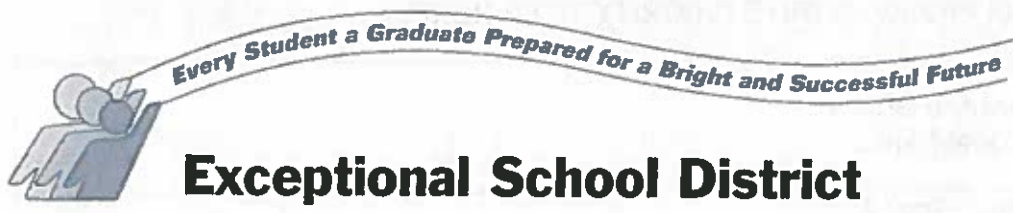
<p>Step 6</p>	<ul style="list-style-type: none"> ▪ Board members individually evaluate the superintendent's performance, using instruments and methods agreed to by the governance team. ▪ The full board schedules a closed session meeting to have a conversation and develop the full document. ▪ The board president and/or other designated person compile(s) evaluations and create(s) a summary document that is reviewed and approved by the full board. ▪ Copies of the approved confidential summary document are distributed to the board and the superintendent.
<p>Step 7</p>	<ul style="list-style-type: none"> ▪ In closed session, after all parties have received copies of the board evaluation, the board and superintendent meet to discuss the evaluation. ▪ At this time, the superintendent has the opportunity to respond to the board's evaluation. ▪ Following the annual formal evaluation meeting of the superintendent and the board of education, the final evaluation is signed by the board president (or the entire board) and superintendent. The final signed document is provided to the superintendent for inclusion in his/her personnel file.
<p>Step 8</p>	<ul style="list-style-type: none"> ▪ Initial goals are set for the next year. ▪ Board and superintendent review process, format and timeline for upcoming year.

Superintendent Governance Standards

As a corollary to the CSBA Professional Governance Standards, a team of California superintendents including the ACSA Superintendents Committee and the CSBA Superintendents Advisory Council developed a set of Superintendent Governance Standards. We highly recommend that these be included as part of the Professional Governance Standards adoption.

The Superintendent:

- Promotes the success of all students and supports the efforts of the Board of Trustees to keep the district focused on learning and achievement.
- Values, advocates and supports public education and all stakeholders.
- Recognizes and respects the differences of perspective and style on the Board and among staff, students, parents and the community — and ensures that the diverse range of views inform board decisions.
- Acts with dignity, treats everyone with civility and respect, and understands the implications of demeanor and behavior.
- Serves as a model for the value of lifelong learning and supports the Board's continuous professional development.
- Works with the Board as a “governance team” and assures collective responsibility for building a unity of purpose, communicating a common vision and creating a positive organizational culture.
- Recognizes that the board/superintendent governance relationship is supported by the management team in each district.
- Understands the distinctions between board and staff roles, and respects the role of the Board as the representative of the community.
- Understands that authority rests with the Board as a whole; provides guidance to the Board to assist in decision-making; and provides leadership based on the direction of the Board as a whole.
- Communicates openly with trust and integrity including providing all members of the Board with equal access to information, and recognizing the importance of both responsive and anticipatory communications.
- Accepts leadership responsibility and accountability for implementing the vision, goals and policies of the district.



Exceptional School District

SUPERINTENDENT EVALUATION

School Year

Progress toward District Goals

Professional / Personal Qualities

Relationship with Board

Superintendent Evaluation

- Progress toward Goals -

District Priority – WRITE PRIORITY TITLE HERE...	
Long-range Goal 1: Write goal here...	
Strategic Goal 1: Write strategic goal here...	
Success Indicators:	
<ul style="list-style-type: none"> Write success indicator here... <i>split row into necessary number of columns</i> 	<ul style="list-style-type: none"> Write success indicator here... <i>split row into necessary number of columns</i>

Board Comments – Commendations / Recommendations:	Exceeded Expectations	Met Expectations	Did Not Meet Expectations

Write board comments here...

Commendations:

Recommendations:

Superintendent Evaluation - Professional / Personal Qualities -

Superintendent Governance Standard:			
Write Superintendent Governance Standard Here...			
Specific Goal: Write specific goal here...			
Success Indicator(s): Write Success indicators here...			
Board Comments – Commendations/ Recommendations:	Exceeded Expectations	Met Expectations	Did Not Meet Expectations

Write board comments here...

Commendations:

Recommendations:

Superintendent Evaluation

- Relationship with the Board -

Superintendent Governance Standard:			
Write Superintendent Governance Standard Here...			
Specific Goal: Write specific goal here...			
Success Indicator(s): Write Success indicators here...			
Board Comments – Commendations / Recommendations:	Exceeded Expectations	Met Expectations	Did Not Meet Expectations

Write board comments here...

Commendations:

Recommendations:

Superintendent Evaluation

-Overall-

Progress Toward Goals - Overall	Exceeded Expectations	Met Expectations	Did Not Meet Expectations
<i>Board Comments – Commendations / Recommendations</i>			

Write board comments here...

Commendations:

Recommendations:

Personal / Professional Qualities - Overall	Exceeded Expectations	Met Expectations	Did Not Meet Expectations
<i>Board Comments – Commendations / Recommendations</i>			

Write board comments here...

Commendations:

Recommendations:

Superintendent Evaluation

--Overall--

Relationship with the Board - Overall	Exceeded Expectations	Met Expectations	Did Not Meet Expectations
Board Comments – Commendations / Recommendations			

Write board comments here...

Commendations:

Recommendations:

Superintendent Evaluation

Superintendent Response:

Write Superintendent comments here...

Superintendent:
Name

Board of Education:

Name, President

Name, Vice President

Name, Clerk

Name, Trustee

Name, Trustee

DATE:

CSBA Sample | BB 9400 Board Bylaws

Board Self-Evaluation

Note: The following optional bylaw may be revised to reflect district practice.

The Governing Board shall annually conduct a self-evaluation in order to demonstrate accountability to the community and ensure that district governance effectively supports student achievement and the attainment of the district's vision and goals.

The evaluation may address any areas of Board responsibility, including but not limited to Board performance in relation to vision setting, curriculum, personnel, finance, policy, collective bargaining and community relations. The evaluation also may address objectives related to Board meeting operations, relationships among Board members, relationship with the Superintendent, understanding of Board and Superintendent roles and responsibilities, communication skills, or other boardmanship skills.

Note: CSBA's Maximizing School Board Leadership series contains sample questions for Board self-evaluation in each area of major Board responsibility.

The Board shall be evaluated as a whole. Individual Board members also are encouraged to use the evaluation process as an opportunity to privately assess their own personal performance.

Each year the Board, with assistance from the Superintendent, shall determine an evaluation method or instrument that measures a reasonable number of previously identified performance objectives. Videotape of a Board meeting may be used as an evaluation tool only with the consent of all Board members.

Note: Pursuant to Government Code [54962](#), the Board may hold a closed session only for purposes expressly authorized by the Brown Act (Government Code [54950-54962](#)) or by a provision of the Education Code. Neither code authorizes closed session discussions for the purpose of Board self-evaluations; see BB [9321](#) - Closed Session Purposes and Agendas. Government Code [54957](#), which authorizes closed sessions for personnel matters such as evaluations, specifically excludes elected officers or members of a legislative body.

Any discussion of the Board's self-evaluation shall be conducted in open session. At the request of the Board, a facilitator may be used to assist with the evaluation process. The Board may invite the Superintendent or others to provide input into the evaluation process.

Following the evaluation, the Board shall develop strategies for strengthening Board performance and shall establish priorities and objectives for the following year's evaluation.

Board Self-Evaluation Result

SAMPLE



1. Conditions of Effective Governance

Number of members responded

		Almost Always	Often	Less Often	Rarely	Not Sure
Board unity						
1. The board is focused on achievement for all students.		1	0	3	1	0
2. The board is committed to a common vision.		0	1	2	2	0
3. The board stays focused on district priorities.		0	0	1	1	3
4. The board works well together.		4	1	0	0	0
5. The board commits the time to become informed.		2	3	0	0	0
6. Individual board members do not undermine board decisions.		4	0	1	0	0
Roles and responsibilities						
7. Board members agree on the role and responsibilities of the board and the superintendent.		0	0	1	3	1
8. Board members follow board agreements regarding speaking for the board.		4	1	0	0	0
9. Board members keep confidential matters confidential.		5	0	0	0	0
10. The board gives direction to the superintendent only at board meetings.		1	2	1	0	1
11. Individual board members do not attempt to direct the superintendent.		0	0	1	2	2
Board culture						
12. The board treats the superintendent with respect.		3	1	0	0	1
13. The board manages internal conflicts in a productive manner.		4	1	0	0	0

A strength for most members

A strength for simple majority

Area of growth for simple majority

Area of growth for most members

How to use your *Board Self-Evaluation Results*







When?

The board should schedule a special open-session conversation/discussion meeting to review the results of this survey.

Guide to the Report

The report provides the board with perception data - how trustees individually perceive the board's effectiveness. The range of scores across topics will help the board identify areas in which board members might achieve greater collective clarity in fulfilling their governance responsibilities. The results are color-coded for ease of interpretation.

Color	Distribution of Ratings	Implications
	All board members rated this item as <i>Almost Always</i> or <i>Often</i>	A strength for all members
	A majority of board member rated these items as <i>Almost Always</i> or <i>Often</i>	A strength for majority of members
	A majority of board member rated these items as <i>Less Often</i> or <i>Rarely</i>	An area of growth for majority of members
	All board members rated this item as <i>Less Often</i> or <i>Rarely</i>	An area of growth for all members

The board can improve its cohesiveness by discussing the range of responses, learning each member's rationale for his/her ratings. In some cases, the board may find that members have different expectations for what deserves an 'Almost always' vs. an 'often', but that there is general agreement on how the board is performing.

How to structure the board conversation

As the board discusses these results, remember a few critical points:

- The report displays a range of perceptions, *not facts*.
- Focus your discussion on what matters most.
- Each member should practice empathetic listening and work to understand the views of other board members.
- It's okay to differ in opinion; you don't always need to agree, but *you do need to understand*.

Step 1: Confirm the strengths. (Green)

Step 2: Confirm the areas for growth. (Red)

Step 3: Identify areas where perceptions are mixed. (Blue or Yellow)

Step 4: Focus.

From the results from steps 2 and 3 above, the board should agree on the three to five most important areas for improving board performance. The board should answer the question:
Which areas of improvement will be most beneficial to the board and the district?

Step 5: Set goals.

Set specific, measurable, time-bound goals with success indicators for improving board performance in each area.

Step 6: Schedule board development workshops throughout the year and add them to your Governance Calendar.

If you would like help: CSBA's *Governance Consulting Services* provides board development coaching and guidance. If you would like to discuss how these services can be tailored to meet your particular needs, please call us at 916-669-3293.

Superintendent Evaluation and Board Self-Evaluations

Monterey County
Education Leadership Summit

Presented by
Luan Burman Rivera,
CSBA Governance Educator/Consultant



Agenda

- The Relationship between the Board and the Superintendent
- Superintendent Evaluation Concepts, Process, Tools and Practice
- Board Self-Evaluation
- Questions



The Board and Superintendent

A strong, collaborative relationship between the Board and Superintendent is crucial to the success of the district.



3

Evaluation Success Principles

- Accountability at Every Level
- Two Goals: Performance and Partnership
- Measure and Discuss



Measurement Requires:

Clarity

Focus

Alignment

Coherence



The Big Picture: Alignment

Values

Vision

Mission

Priorities

Goals

Success Indicators



Superintendent Evaluation

- Why do it?
- Public Trust—"It's your job"
- Alignment of District Goals and Superintendent Work
- Best tool for effective Board-Superintendent dialogue about performance
- Affirmation of desired performance



Avoid Evaluating on...

- Superintendent's personal skills and traits unless agreed upon in advance
- Performance deficiencies not previously identified
- Rumors based on gossip from a few disgruntled community members
- Topics that cannot be measured by some objective standard



Two Primary Content Sources

- Progress on district goals/LCAP
- Personal and professional qualities (based on Superintendent Governance Standards)



“SMART” Criteria for Goals

- Specific: precise accomplishment
- Measurable: concrete criteria
- Achievable: challenging & attainable
- Relevant: aligned with District goals/needs
- Time Based: timeline for projected outcome

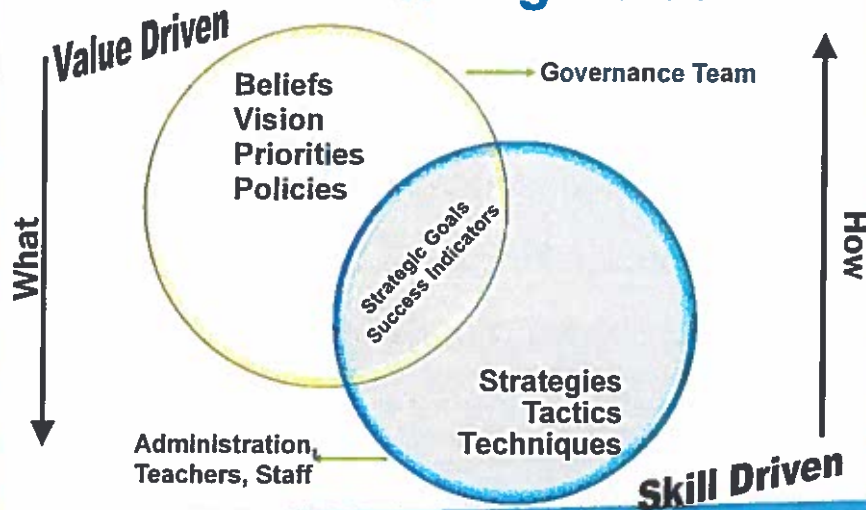


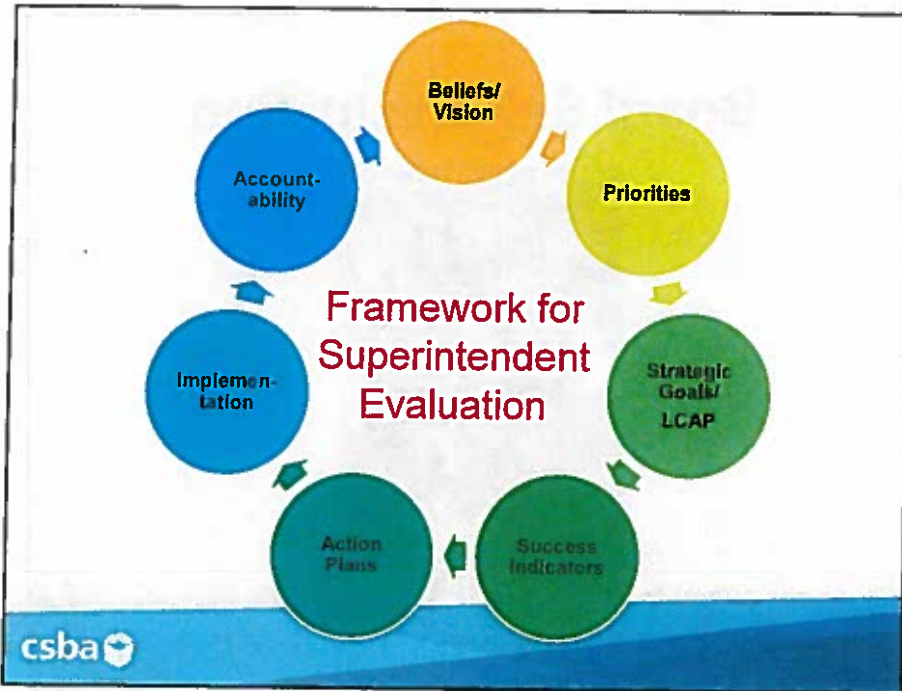
Success Indicator

- Each goal needs one or more success indicators
- Success indicators include:
 - Specific outcome
 - Specific parameters as appropriate



Understanding Roles





Format/Tool



Board Self-Evaluation



Board Self-Evaluation

Why do it?

- Board Policy (Bylaw 9400)
- Set an example for the District
- Objective, collective standards for forging a productive team
- Alignment of work (Board responsibilities) with District priorities/goals
- Public Trust



Models for Board Self-Evaluation

- Professional Governance Standards
- Effective Governance and Board Responsibilities

Board Responsibilities

- Setting Direction
- Establishing Structure
- Providing Support
- Ensuring Accountability
- Community Leadership

Board Effectiveness

- Governance Values, Core Beliefs
- Role Clarity
- Culture (Norms)
- Operations (Protocols)
- Meetings
- Transitions



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Debrief

Questions and Issues I have not Covered

Luan Burman Rivera lriviera@csba.org



How to use your *Board Self-Evaluation Results*







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5. The board commits the time to become informed.		2	3	0	0	0
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Roles and responsibilities

7. Board members agree on the role and responsibilities of the board and the superintendent.		0	0	1	3	1
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Board culture

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Area of growth for simple majority

Area of growth for most members

