1) Why evaluate?
Evaluation fulfills the four board governing roles:
- Clear Expectations: Goal Setting.
- Structure: Clear plan, timeline.
- Accountability: Measurement of progress to goals, superintendent performance.
- Advocacy: Communication of goals and progress in meeting them.

Evaluation should be...
- A positive, objective process
- Structured communication between the board, the community and the superintendent
- A tool for informed change
- A method for promoting the goals, values and progress of the district
- Performed in a supportive atmosphere

2) Requirements
- State statutes *(ORS)* 192.660, 342.513, 342.120, 342.815, 332.505
- Administrative Rules *(OAR)* 581-022-1720
- Board Policy Manual *Policy CBG, CBA, BCD*
- Superintendent Employment Contract
- Board/Superintendent Working Agreement

3) Planning
It's all about "Clear expectations"
Think About:
- What issues require leadership from the superintendent?
- What changes do we want to see next year?
- What is the superintendent's role in leading these changes?
- How do we measure progress?
- When do we want a report on the progress?

How can we evaluate objectively and fairly?
- Only evaluate on the agreed upon performance objectives and/or goals
- How will you measure achievement?
- What documentation or evidence will you require?

Plan the evaluation calendar
- Identify one or more informal progress review meeting dates
- Identify formal evaluation date
- Beware of the *Ides of March* requirements
- Give notice to the person about the option for an "open hearing."
Timeline
- February - August: Goal Setting
- Adopt an evaluation document
- January: Interim progress report
- February: Evaluation process
- By March 15: Formal evaluation meeting
- End of school year: Final results

Adopt an evaluation document
- Should list the goals
- Provides a defined rating system; i.e. numerical, descriptive, etc.
- Provides space for written comments
- Also serves as worksheet for the board's composite evaluation

Part 1: Performance Standards
- Leadership and District Culture
- Policy and Governance
- Communications and Community Relations
- Organizational Management
- Curriculum Planning
- Instructional Leadership
- Human Resources Management
- Values and Ethics of Leadership
- Labor Relations

Part 2: Goals
- The Board meets to set goals immediately after one evaluation, for the next year
- Three to Five SMART Goals
  - Simple
  - Measurable
  - Attainable
  - Results Oriented
  - Time Bound

Part 3: 360-degree evaluation
- May be Superintendent or board driven
- Decide what groups will be surveyed
- Statistically significant, random?
- Define the questions

Self-Evaluation
- Superintendent fills out forms for both part 1 and part 2 and reports back to the board.
- Assists board in understanding what has been accomplished.
- May be reported before the formal evaluation meeting or at the same time.

Completing the job
- Superintendent reports results of self-evaluation and 360-degree evaluation to board.
- Members fill out the evaluation worksheets for parts 1 and 2 individually
- Board meets to prepare a composite evaluation (executive session allowed)
- Composite evaluation is presented to superintendent. (executive session is allowed)
- Once signed off, it becomes a public document
- Report the composite evaluation to the public
Checklist
1. Consult district requirements
2. Review relevant documents
3. Adopt evaluation criteria (public)
4. Adopt evaluation calendar (public)
5. Hear interim progress reports
6. Circulate worksheets to board
7. Schedule executive session to compile results
8. Discuss composite evaluation with the superintendent
9. Report results to the public

4) A Good Superintendent Evaluation Process:
   • Provides for no surprises during the performance review
   • Promotes a growth process with follow-up plans for action and review by the board
   • Assures timely, thorough review of performance.

5) Things to Remember:
   Public adoption?
   • A governing body (school board) may hold an executive session to review and evaluate the job
     performance of the chief executive, employees and staff, so long as the person whose performance is
     being evaluated does not request an "open hearing."
     ORS192.660(2)(i)
   Issues...
   • A governing body may not use an executive session held for purposes of evaluating the chief
     executive "to conduct a general evaluation of an agency goal, objective or operation."
     ORS 192.660(8)
   • Public Records
     o The final evaluation document is a public record
     o Any evaluation documents/surveys returned to the board/central office are public records
     o Board member's notes may be public records

6) Resources:
   • Board Self Evaluation Handbook from OSBA (downloaded from our website)
   • Superintendent Evaluation Handbook from OSBA (downloaded from our website)
Board Self-Evaluation
Summer Board Conference 2017

Board self-evaluation provides more than just accountability and communication. It provides an opportunity for building the best possible leadership for the district and community. Commitment to quality, excellence, continuous learning, and local control of the educational system is demonstrated when boards lead by example. Oregon School Boards Association's Board Self-Evaluation document is designed to provide both a clear objective system for board evaluation and flexibility. Part 1 of the evaluation follows a set of performance standards focused on the roles, responsibilities and work of the board. Part 2 focuses on the board's performance in supporting the achievement of district goals.

Why evaluate?

The culture of an organization is set at the top, and it is no different for school and educational organizations. School boards must be strong, effective leaders to meet the challenges faced by public education today. School board members direct the affairs of the district by setting goals, developing policy, communicating and evaluating, all with a focus on the achievement and best interests of all students in the district. Self-assessment by the board provides valuable information, discussion and communication.

Self-evaluation by the board:

- Holds the board accountable to themselves, the staff and the community.
- Allows for reflection by board members on their individual and collective behavior and performance.
- Fosters open communication.
- Improves decision making by enhancing a common understanding of philosophies and goals.
- Resolves differences of opinion and challenges assumptions.
- Provides insight into how and why decisions are reached.
- Allows new board members an opportunity to understand board processes.
- Identifies strengths and weaknesses of individual board member performance and that of the board as a whole.
- Holds the board accountable in its role as representative of the public.
- Provides a starting point for effective goal setting and long-range planning.

OSBA has developed a standardized evaluation process and two-part evaluation tool that can help answer these questions and serve as the foundation upon which school boards and education service districts can build their own evaluation process and documents.