



OSA

CHARTER DIRECTOR EVALUATION WORKBOOK

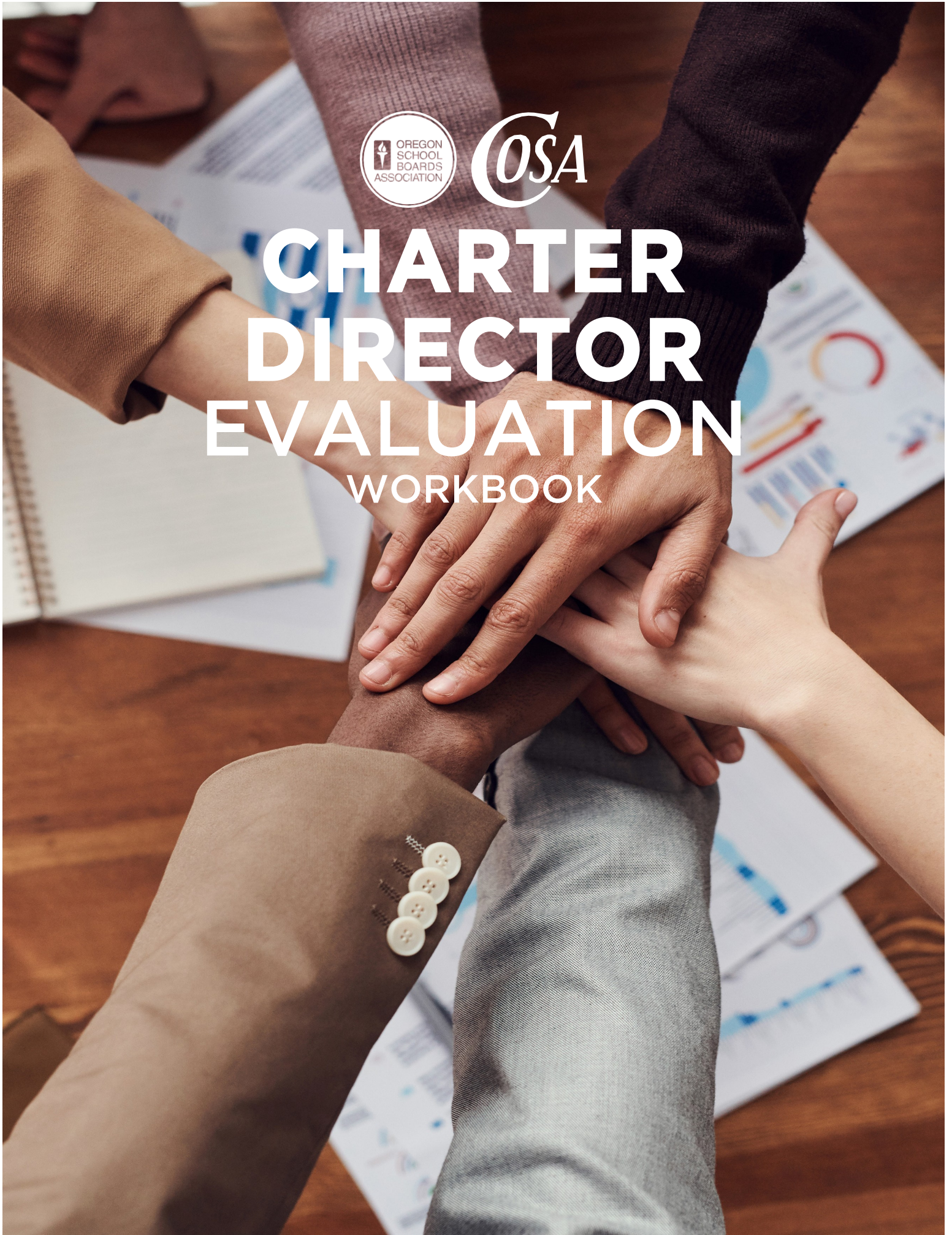


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Dear Oregon School Boards and Charter School Directors,

The research is clear — a healthy and productive relationship between a school board and its director is essential to the sustained success of any charter school. Simply put, when directors and school boards work effectively together, especially over the long term, their schools and students do better.

The role of the director is critical — and together with support provided by the school board through constructive direction, guidance, and evaluation of the director, sets the foundation and ensures success. The evaluation of the director is the responsibility of the charter school board. This OSBA and COSA endorsed process is intended to guide the evaluation process between the board and their director with a collaborative approach that is designed to continuously improve not only the performance of the director, but also the system they lead. The evaluation of the director, if done well, should provide useful feedback to the director, as well as clear accountability for the director and the board.

In the 2019-20 school year, OSBA and COSA partnered to produce this co-endorsed Charter School Director evaluation process. The purpose of this endeavor was to bring clarity and consistency to charter school boards' performance expectations of directors and to provide guidance to boards and directors for an effective evaluation process based on evidence-based practices and continuous improvement.

The responsibility for evaluating the director resides with the charter school board; however, this process should be done in a collaborative manner. Boards may choose to work with a consultant to assist them in this process. This process should be an iterative cycle that helps guide and focus the key work in Oregon charter schools and supports the continuous improvement of Oregon charter school directors.

Sincerely,



Jim Green, OSBA Executive Director



Craig Hawkins, COSA Executive Director

DIRECTOR EVALUATION OVERVIEW

Selecting the director and evaluating their performance is one of the charter school board's most important responsibilities.

This workbook is designed to help boards and directors navigate the evaluation process together and it is intended to be collaborative and keep the board's role at the forefront.

A HIGH-QUALITY DIRECTOR EVALUATION:

- develops good board/director relationships
- clarifies roles
- identifies director professional development opportunities
- provides a mechanism for public accountability
- provides input and feedback to the director to guide continuous improvement

PERFORMANCE EVALUATIONS ARE MOST EFFECTIVE WHEN THEY ARE DESIGNED AND USED FOR:

- strengthening the board/director relationship
- reviewing past performance
- communicating future expectations and goals
- determining future professional development for the director
- making ongoing employment decisions (contract extension and compensation)

FIVE-PART EVALUATION TOOL

OSBA and COSA have developed a five-part tool for evaluating directors.

- **PART 1 DIRECTOR PERFORMANCE STANDARDS. (Appendix A)**
These are based on the Professional Standards for Educational Leaders (PSEL, 2015) and District Level National Educational Leadership Preparation Standards (NELP, 2018) and augmented by standards jointly developed by the Coalition of Oregon School Administrators (COSA) and the Oregon School Boards Association (OSBA).
- **PART 2 DIRECTOR GOALS. (Appendix B)**
This section evaluates progress toward the director's goals established by the board and director at the beginning of the evaluation cycle.
- **PART 3 EVIDENCE OF PERFORMANCE. (Appendix C)**
This consists of the director's self-evaluation and their regular reporting to the board on progress toward standards and goals. This area may be supported by artifacts or documents specifically in those areas where the board may lack direct knowledge.

- **PART 4 FEEDBACK ON PERFORMANCE. (OPTIONAL, Appendix D)**
This consists of a targeted feedback survey (TFS)¹ of the director's performance by selected staff and members of the community that have frequent, consistent interactions with the director.
- **PART 5 EVALUATION SUMMARY. (Appendix E)**
This is the summary of the evaluation the board writes to share its unified message with the director and the public.

School board members typically complete ratings in Parts 1 and 2 individually and should consider information gathered in Parts 3 and 4 (if used) in these ratings. The individual board member ratings are then compiled and summarized into one comprehensive evaluation. Part 5 is a written report given by the board for discussion with the director and placed in the director's personnel file. A summary of the evaluation is shared with the public at the conclusion of the formal evaluation cycle. It is important that the board speak with one voice that represents the consensus of the board.

HOW CAN WE EVALUATE OBJECTIVELY AND FAIRLY?

Objective and fair evaluations take into consideration policy, the director's employment contract, standards, goals, articles of evidence and targeted feedback surveys. At the beginning of each evaluation cycle, the board should review the director's contract and its own policy regarding director evaluation. With that information, the board then determines the criteria, process, and timeline so there are no surprises when the formal evaluation occurs. To be fair and objective, boards should only introduce additional criteria during the year in extenuating circumstances and should follow policy CBG for guidance on doing so. **It is the board's responsibility to ensure that policy and contractual timelines are met.**

DOCUMENTATION

The processes outlined in this workbook are more than a checklist. They require the objective consideration of evidence demonstrating the degree to which each standard has been met. This evidence can be through direct interaction and observation of the director's performance or may be obtained through the director's self-evaluation and/or information gained through a targeted feedback survey. Documentation may be provided by the director orally, as written lists, or as specific documents. Some boards and directors may select an artifacts of evidence approach¹.

EVALUATION CONFERENCES AND CHECK-INS

Face-to-face conversations between the board and director during the evaluation cycle are essential to an effective process. Regular reports to the board by the director and check-in meetings should occur at least quarterly throughout the year. This provides the director and board an opportunity to be updated on the director's progress toward meeting the goals and performance standards, and to provide feedback on any concerns the board might have. This also allows the director an opportunity to seek further guidance and support from the board or provide further clarification about the progress needed to meet the targets and make mid-year corrections on the path to achieving goals and standards. The final evaluation conference is where the board and director meet to discuss the director's performance and an evaluation report is presented.

¹Described later in this workbook

DIRECTOR EVALUATION AT A GLANCE

Time to start thinking about next year!



MARCH THROUGH AUGUST | PRE-EVALUATION

In collaboration with the director, adopt all standards, goals and evaluation procedures. This includes adopting materials for Parts 1 and 2 and adopting a schedule for Parts 3 and 4 (if used).

AUGUST THROUGH MARCH* | CHECK-IN MEETINGS

Check-in meetings occur at least quarterly. These check-ins give the director the opportunity to provide information related to goals and standards, and for the board to ask questions about progress and provide additional guidance and support. This also includes a final check-in in which the director can present their self-evaluation. These meetings are generally conducted in executive session. This correlates to Part 3.

JANUARY THROUGH MARCH* | GATHER INFORMATION

The director's self-evaluation is presented to the board. Board members rate the director on Parts 1 and 2 individually, and then compile ratings and comments into a summary document. If a targeted feedback survey is used, the survey would be conducted in this phase.

MARCH* | EVALUATION RESULTS

By March 15th, or at a date specified in the Director's contract, the board meets with the director to review the evaluation results. This meeting is conducted in executive session unless the director requests the meeting be conducted in public. Generally, the board crafts a short narrative statement about the evaluation to be shared at a regular board meeting. This correlates to Part 4.

MARCH* | EVALUATION CONCLUSION

The board adopts the short narrative summary in open session. This corresponds to Part 5.

*Review the director's contract and charter school policy for any applicable deadlines.

PERFORMANCE RATINGS

PART 1 (In Appendix A) includes eight standards with descriptors. Board members should not rate descriptors but, rather, consider them as a whole in determining the overall rating for that performance standard.

The scoring guide for each standard uses the following four categories:

4 = ACCOMPLISHED | 3 = EFFECTIVE | 2 = DEVELOPING | 1 = INEFFECTIVE

Read each standard's descriptions carefully while considering your rating and select the score that most closely matches your judgment and the evidence provided of the director's work in this area.

PART 2 (In Appendix B) includes any goals that were set for the director during the evaluation cycle. The director's goals should be rated with the same scale. It is highly recommended that the director provides a self-evaluation on their performance in the standards, goals and any other criteria determined for the evaluation cycle. This self-evaluation and any accompanying evidence provided in Part 3 shall be provided to the board prior to conducting their evaluation of the director's performance.

WRITTEN COMMENTS

Written comments from individual members of the board help clarify ratings on standards and goals; however, they are not intended as direct feedback to the director. They may contribute to the board's one-voice message to the director that can help clarify the evaluation feedback.

The written comments may be prepared by a board member or consultant working on behalf of the board. This provides the board with the opportunity to deliver specific constructive criticism and/or accolades and provides the director with useful information for continuous performance improvement. Again, the board should speak with one voice in making written comments on the final evaluation report and summary to the director and the community.

PUBLIC MEETINGS LAW

A governing body such as a charter school board may hold an executive session to evaluate the job performance of its chief executive officer, so long as the person being reviewed does not request an open session (ORS 192.660(2)(i)). However, the executive session for evaluation does not allow the board to discuss the director's salary, conduct a general evaluation of a charter school goal or give directives to personnel about charter school goals (ORS 192.660(8)). The governing body must give advance notice of the performance evaluation to allow the person whose performance will be evaluated to choose whether to conduct the evaluation in open session or executive session.

The Attorney General's Public Records and Meetings Manual states that disclosure of the performance evaluation for the chief executive officer generally is not an unreasonable invasion of privacy, and therefore disclosable to the public even though the actual evaluation was held in executive session. This disclosure is in contrast to the disclosure of a record of discipline about a public officer, which is conditionally exempt from disclosure. OSBA and COSA recommend that a narrative summary of the performance evaluation be presented to the public after the evaluation is complete.

TIMELINE AND ACTION

1. **PRE-EVALUATION** (March, April or as soon as a new director begins employment)

Before the new evaluation cycle begins, and prior to the completion of the charter school's budget, the board should review any statutes, recent legislation, policies and the director's contract for any specific criteria regarding evaluation that must be followed by the board. Following that review, the board and director should mutually establish the evaluation timeline, process, and criteria (goals and expectations, and standards). The board and director should meet to develop a clear set of goals for the director that are related to the goals for the organization for the coming year. OSBA and COSA jointly recommend the performance standards provided in this document which are based on national standards for district leaders. In some cycles it is prudent for the board to emphasize and prioritize certain standards based on previous evaluations, the tenure of the director, or the strategic priorities of the charter school.

2. **CHECK-IN MEETINGS** (July, October, and January or quarterly, based upon when a new director begins employment)

The board and the director meet to discuss the director's progress toward meeting the formally adopted goals, to talk about any specific concerns related to the director's performance, and to offer support to the director. It is recommended that the director, in the January board meeting, provides the self-evaluation (Part 3) for board members to consider when they each complete Parts 1 and 2 of the process.

3. **GATHER INFORMATION** (By March 15 or date specified in contract)

Compiling results from individual board members can be confusing if there are conflicting perspectives; therefore, it is best done by discussion among all board members sitting together in executive session. Some boards work with a consultant to assist in the evaluation process including facilitating the TFS and compiling individual board member ratings into one unified rating. Since the director works for the board (as a whole, not its individual members), it is critical that board members recognize the importance of coming to a consensus and speaking with one voice in the evaluation. The evaluation should result in areas for celebration, in steps for professional development for the director, and in a plan for informing the community about the results of the evaluation and status of the charter school's goals.

4. **EVALUATION RESULTS** (March)

OSBA and COSA recommend that a narrative summary of the performance evaluation be presented to the public after the evaluation is complete. Before the beginning of the next evaluation year, the board and director should meet to begin the next cycle of goal setting and evaluation, which allows the director time to plan for the ensuing year. The goals should be formally adopted by the board and made public to keep the charter school and community informed.

5. EVALUATION CONCLUSION

There may be renewal and/or evaluation provisions in the director's contract, so boards should review the contract for any requirements about providing notice to the director of renewal or nonrenewal. If you have questions regarding the terms and renewal provisions in the director's contract or are considering nonrenewal, we recommend that you consult with legal counsel. The director evaluation process provides the board with an opportunity to share the school charter school's progress with the community. A short summary of the board's evaluation of the director should be prepared based on the data and evidence gathered in the evaluation process.

PERTINENT OREGON REVISED STATUTES (ORS) AND OREGON ADMINISTRATIVE RULES (OAR)

ORS 192.660 Executive sessions permitted on certain matters; procedures; news media representatives' attendance; limits.

(1) ORS 192.610 to 192.690 do not prevent the governing body of a public body from holding executive session during a regular, special or emergency meeting, after the presiding officer has identified the authorization under ORS 192.610 to 192.690 for holding the executive session.

(2) The governing body of a public body may hold an executive session: ...

(i) To review and evaluate the employment-related performance of the chief executive officer of any public body, a public officer, employee or staff member who does not request an open hearing...

(8) A governing body may not use an executive session for purposes of evaluating a chief executive officer or other officer, employee or staff member to conduct a general evaluation of an agency goal, objective or operation or any directive to personnel concerning agency goals, objectives, operations or programs.

OAR 199-040-0020 Permitted Topics for Executive Session

(3) Compensation, including salaries and benefits, must not be discussed or negotiated during an executive session under ORS 192.660(2)(a), (b) or (i).

OREGON SCHOOL BOARDS ASSOCIATION SELECTED CHARTER SCHOOL SAMPLE POLICY CBG

Adopted:

EVALUATION OF THE [ADMINISTRATOR] [DIRECTOR]

The [administrator's] [director's] job performance will be evaluated formally [at least annually]. Additional criteria for the evaluation, if any, will be developed [at a public Board meeting] prior to conducting the evaluation. The [administrator] [director] will be notified of the additional criteria prior to the evaluation.

The Board's discussion and conferences with and about the [administrator] [director] and their performance will be conducted in an executive session, unless the [administrator] [director] requests a session open to the public. Such an executive session will not include a general evaluation of any public charter school goal, objective, or operation. Results of the evaluation will be written and placed in the [administrator's] [director's] personnel file.

At the Board's discretion, it may notify the [administrator] [director] in writing of specific areas to be remedied, and the [administrator] [director] may be given an opportunity to correct the problem(s). Where the Board provided written notice pursuant to the prior sentence, if the Board determines the [administrator's] [director's] performance remains unsatisfactory, the Board may dismiss or non-renew the [administrator's] [director's] pursuant to Board policy, the [administrator's] [director's] employment contract and state law and rules. In those situations where the [administrator's] [director's] employment contract includes an evaluation, dismissal, or non-renewal provision, it shall take precedent over this policy.

END OF POLICY

LEGAL REFERENCE(S):

ORS 338.115(2)

(There are no OSBA-recommended Administrative Regulations (ARs) associated with this policy. If your charter school has an AR for this policy, we recommend you delete it.)

POST-EVALUATION TASKS

As soon as one evaluation cycle is complete, a new one begins. It is important that the momentum from the previous cycle be maintained and that a new cycle with standards, goals and expectations begins immediately.

Based on the outcomes of the previous year's goals, as well as current and future charter school initiatives, the director should draft goals for the next evaluation period, which the board should consider, discuss, potentially amend, and then formally adopt. This must be done in open session. These goals should be measurable and should reflect the director's role in the overall vision and/or goals of the charter school.

The board should ensure that the standards, process, components, and timeline that the board adopts are consistent with evaluation language in the director's contract. This should be done prior to adopting the process and tool for the new cycle.

The board should also adopt the standards to measure the director's performance, the timeline of the new evaluation cycle and determine whether a targeted feedback survey will be conducted as part of the evaluation cycle.

A critical element of the evaluation cycle is scheduling designated evaluative check-ins between the board and director, which may take place in executive session if they meet legal criteria. This allows the conversation to occur candidly. These are more than just updates at board meetings; these check-ins are meant to focus specifically on the director's performance throughout the year, reflecting progress on goals, performance against standards and any specific concerns the board may have.

An overall performance evaluation should never be a surprise to a charter director or the board; evaluative check-ins throughout the year allow the director to understand the board's perspective on the director's performance, make any course corrections necessary, and ask for support where needed. We recommend that these check-ins occur quarterly and be embedded in the evaluation timeline adopted by the board.

TIMELINE

MAR. APR. MAY JUNE JULY AUG. SEPT. OCT. NOV. DEC.

JAN.

FEB.

MAR.

APR.

PRE-EVALUATION

Adopt all standards, goals and evaluation procedures. This includes adopting materials for Parts 1 and 2, and adopting a schedule for Parts 3 and 4.

CHECK-IN MEETINGS

We recommend that these occur at least quarterly. These check-ins give the director the opportunity to provide information related to goals and standards, and for the board to ask questions about progress. This also includes a final check-in in which the director can present their self-evaluation. These are generally done in executive session. This correlates to Part 3.

GATHER INFORMATION

Board members rank the director on Parts 1 and 2. If the board chose to have additional stakeholders fill out surveys or provide information, now is the time to conduct those surveys.

EVALUATION RESULTS

APPENDICES

APPENDIX A

PART 1

EVALUATION COMPONENT PERFORMANCE STANDARDS

INSTRUCTIONS

1. Following are descriptors of each of the eight performance standards. Each board member should rate all eight of the performance standards. Performance indicators are listed below each performance standard. These performance indicators suggest objective measures to consider. Do not rate each performance indicator separately; only rate the overall performance standard.
2. Your comments in support of your rating will be helpful during the board discussion for preparation of a summary evaluation form.
3. The board will meet in executive session to discuss the results and prepare a final summary evaluation form representing the consensus of the board.
4. The director will be presented with the final summary report from the full board, not the individual evaluation forms. It is important that the board speak with one voice in evaluating the director.

DIRECTOR EVALUATION STANDARDS AND DESCRIPTORS

KEY:

4 = ACCOMPLISHED PERFORMANCE

Performance in this area is routinely outstanding and acts as a model for others.

3 = EFFECTIVE PERFORMANCE

Performance in this area consistently meets the standard.

2 = DEVELOPING

Performance occasionally meets the standard but is not yet consistent.

1 = INEFFECTIVE

Performance currently does not meet the standard.

Rate each of the following director standards based on national standards (NELP).

If you have no basis for a rating, please mark "NA" for not applicable. Support your ratings with comments for each section.

STANDARD 1

VISIONARY CHARTER SCHOOL LEADERSHIP

DESCRIPTORS

- Leads a collaborative process with the board to design (or reaffirm) the charter school mission and vision that reflects a core set of values and priorities.
- Leads the diverse stakeholder involvement in the development (or revision) of the charter school's continuous improvement plan based upon the charter school's mission and vision.
- Implements the charter school's continuous improvement plan and communicates its progress.

RATING 

COMMENTS

STANDARD 2

ETHICS AND PROFESSIONAL NORMS

DESCRIPTORS

- Ensures ethical decisions and cultivates professional norms and culture including equity, fairness, integrity, transparency, trust, collaboration, and perseverance.
- Makes ethical and legal recommendations to the board.
- Models ethical behavior in their own conduct and cultivates ethical behavior in others.

RATING



COMMENTS

STANDARD 3

INCLUSIVE CHARTER SCHOOL CULTURE

DESCRIPTORS

- Develops and maintains a supportive, equitable, culturally responsive and inclusive charter school culture.
- Evaluates, cultivates, and advocates for equitable access to a safe and nurturing school, and the opportunities and resources necessary to support the success and well-being of each student.
- Ensures equitable, inclusive, and culturally responsive instructional and behavioral support practices among teachers and staff.

RATING



COMMENTS

STANDARD 4

CULTURALLY RESPONSIVE INSTRUCTIONAL LEADERSHIP AND IMPROVEMENT

DESCRIPTORS

- Evaluates, designs, fosters, and implements coherent systems of curriculum instruction, supports, assessment and instructional leadership.
- Implements coordinated systems of support, including coaching and professional development for staff.
- Manages an appropriate system of assessments, data collection and analysis that supports instructional improvements, equity, student learning and well-being, and instructional leadership.
- Ensures instruction throughout the charter school utilizes culturally responsive practices and all staff are trained.

RATING 4 3 2 1 N/A

COMMENTS

STANDARD 5

COMMUNICATION AND COMMUNITY RELATIONS

DESCRIPTORS

- Develops and implements effective and collaborative systems that engage multiple and diverse stakeholder groups.
- Engages and effectively communicates with diverse families, community partners, and other constituencies to strengthen student learning.
- Cultivates relationships and partnerships with members of the business, civic and local government in support of their advocacy for school and community needs.
- Goes beyond the charter school and local community to advocate for students at the county, regional and/or state level.

RATING



COMMENTS

STANDARD 6

EFFECTIVE ORGANIZATIONAL AND CONTRACT MANAGEMENT

DESCRIPTORS

- Implements equitable strategies, processes, and systems to recruit, hire, develop, and retain high- performing personnel who demonstrate a shared commitment to student success.
- Has a strong line of communication with the authorizer’s charter school liaison and proactively involves/informs the authorizer of any high-level information of which the authorizer should be aware.
- Creates and maintains organizational structures that maximize the charter school’s capacity to positively impact student learning.
- Understands the charter school’s responsibilities as defined in the charter contract. Ensures compliance with the contract, including timely submission of high-quality deliverables to the authorizer.
- Updates the board on contract compliance issues, renewal processes, and other pertinent information related to the charter contract and/or health of the organization.

RATING 

COMMENTS

STANDARD 7

EFFECTIVE FINANCIAL MANAGEMENT

DESCRIPTORS

- Develops a proposed budget in accordance with board priorities and charter school direction.
- Manages the equitable implementation of charter school resources aligned with the budget adopted by the board.
- Communicates the budget priorities and ensures regular updates on implementation of the budget.

RATING



COMMENTS

STANDARD 8

POLICY, GOVERNANCE, AND ADVOCACY

DESCRIPTORS

- Develops relationships, leads collaborative decision-making and governance, and represents and advocates for charter school needs in local, county, and state policy conversations.
- Cultivates a respectful and responsive relationship with the charter school board focused on achieving the shared mission and vision of the charter school.
- Implements, maintains, and communicates charter school, state, and national policy, laws, rules and regulations to staff, board and other appropriate stakeholders.

RATING 

COMMENTS

APPENDIX B

PART 2

EVALUATION COMPONENT GOALS

INSTRUCTIONS

In addition to the performance standards, boards and directors may wish to develop one to three specific director goals to be used in the evaluation process. These goals should be based on the director's previous evaluation and/or the charter school's current strategic initiatives or goals. Ideally, these goals should be developed collaboratively. The director's goals should reflect his/her role in achieving the overall goals of the charter school but are not the same as the overall charter school goals.

1. Each board member should rate the director's performance in meeting their evaluative goals agreed to by the director and the board at the beginning of the evaluation process.
2. Your comments in support of your rating will be helpful during the board discussion for preparation of a summary evaluation report.
3. The board will meet in executive session to discuss the results and prepare a final summary evaluation report representing the consensus of the board.
4. The director will be presented with the final summary report from the full board, not the individual evaluations. **It is important that the board speaks with one voice in evaluating the director.**

SAMPLE GOAL STATEMENT 1:

PERFORMANCE INDICATORS:

(Insert indicators of success here)

- 1.1
- 1.2
- 1.3
- 1.4
- 1.5

SUMMARY RATING — GOAL 1: *(check one)* 4 3 2 1 N/A

COMMENTS:

APPENDIX C

PART 3

EVALUATION COMPONENT

ARTIFACTS OF EVIDENCE/SELF-EVALUATION

The director may be asked to provide additional information to support the board in their evaluation of the performance standards/evaluation goals. In an ideal board-director relationship the board may have very little direct knowledge of the director’s day-to-day operations. Artifacts of evidence are intended to give the board objective information concerning specific performance standards/ evaluation goals. The following table is intended to give some possible examples for each standard; this is not intended to be an exhaustive list. These artifacts may be collaboratively identified at the beginning of the evaluation cycle by the board and director. Artifacts of evidence may also be used in the informal check-in process throughout the performance cycle.

STANDARD 1: VISIONARY CHARTER SCHOOL LEADERSHIP

DESCRIPTORS	ARTIFACTS
<ul style="list-style-type: none"> • Leads a collaborative process with the board to design (or reaffirm) the charter school mission and vision that reflects a core set of values and priorities. • Leads the diverse stakeholder involvement in the development (or revision) of the charter school’s continuous improvement plan based upon the charter school’s mission and vision. • Implements the charter school’s continuous improvement plan and communicates its progress. 	<ul style="list-style-type: none"> • Evidence of how you have constructed and enacted an equity vision and mission across the charter school and community: <ul style="list-style-type: none"> · Newspaper, school banners, website, photo, or other media · Actions communicating clear and coherent vision: newsletter, professional development, etc. · Meetings or presentations to collaborate and implement vision, mission, goals, and plans • Models learning through attending professional development opportunities and applying knowledge • Presentation of at least one plan (e.g., CIP or SIA application) • Resources are clearly aligned with the vision and strategic initiatives: <ul style="list-style-type: none"> · Budget examples of how funds support the vision/strategic initiatives · Staffing patterns that reflect where there is an identified need · Data support goals that are aligned to student learning and growth • Personalized measurable goals focused on student learning and achievement that are specific enough to address short- and long-term plans

STANDARD 2: ETHICS AND PROFESSIONAL NORMS

DESCRIPTORS

- Ensures ethical decisions and cultivates professional norms and culture including equity, fairness, integrity, transparency, trust, collaboration, and perseverance.
- Makes ethical and legal recommendations to the board.
- Models ethical behavior in their own conduct and cultivates ethical behavior in others.

ARTIFACTS

- Agendas and/or minutes from meetings (e.g., community planning, key communicators/advisory meetings, administrative, curriculum team, charter school leadership team, etc.) that demonstrate transparency and equitable practices
- Evidence of ability to confront conflict and build consensus
- Record of solicitation of feedback (collaboration and transparency) and evidence of reflective practice and adaptation
- Reflective journals and evidence of adaptive behavior
- Equity and inclusion plan
- Agendas and/or minutes from meetings that demonstrate collaboration with external partners

STANDARD 3: INCLUSIVE CHARTER SCHOOL CULTURE

DESCRIPTORS

- Develops and maintains a supportive, equitable, culturally responsive, and inclusive charter school culture.
- Evaluates, cultivates, and advocates for equitable access to safe and nurturing schools, and the opportunities and resources necessary to support the success and well-being of each student.
- Ensures equitable, inclusive, and culturally responsive instructional and behavioral support practices among teachers, administrators, and staff.

ARTIFACTS

- Discipline trends (# of expulsions, days of suspension, disaggregated data by sub-groups and groups of interest, # of restraints/seclusions, etc.)
- Diversity training/awareness plan; evidence of an equity lens and implementation of the plan
- Sections in employee handbooks that demonstrate an inclusive charter school culture
- External reviews and audits (e.g., budget, nutrition, transportation, safety, OCR, etc.)
- Evidence that all student needs are addressed equitably
- Response to staff or public concerns/issues (documentation)
- State plans and reports (ELL, SPED, CIP, Title, etc.)
- Student learning data from a variety of sources (SBAC, benchmark/ interim assessments, etc.) to monitor progress and achievement (including disaggregated data)
- Uses data from a variety of sources to inform planning, management of resources, impact instruction and close achievement gaps (including disaggregated by sub-groups and groups of interest)
- Evidence of staff use of equitable instructional practices such as culturally responsive pedagogy and strategies

STANDARD 4: CULTURALLY RESPONSIVE INSTRUCTIONAL LEADERSHIP AND IMPROVEMENT

DESCRIPTORS

ARTIFACTS

- Evaluates, designs, fosters, and implements coherent systems of curriculum instruction, supports, assessment and instructional leadership.
- Implements coordinated systems of support, including coaching and professional development for staff.
- Manages an appropriate system of assessments and data collection, and analysis that supports instructional improvements, equity, student learning and well-being, and instructional leadership.
- Ensures instruction throughout the charter school utilizes culturally responsive practices and all staff are trained.

- Agendas and/or minutes (e.g., community planning, key communicators/advisory meetings, administrative team, curriculum team, charter school leadership team, etc.)
- Common teacher instructional planning time (agendas, outcome date, samples, etc.)
- Comprehensive School Improvement Plan (CIP)
- Curriculum and/or instructional audit (documentation)
- Documentation of coaching and evaluation of administrative staff in instructional practices, curriculum, and assessment
- Instruction related professional development/growth plans (with related data on student achievement)
- Models learning through attendance and application of knowledge from professional development opportunities (documentation)
- Evidence of annual review of charter school's mission statement and alignment to practice
- Evidence of teachers examining and using student achievement data to improve teaching/learning
- Facilitation of charter school leadership team (learning team with all levels of stakeholders from board to classified)
- Program evaluations that address areas of interest or concern (e.g., outreach, equity, behavioral supports, bullying/harassment, character education, etc.)
- Student learning data from a variety of sources (SBAC, benchmark/ interim assessments, etc.) to monitor progress and achievement
- Uses data from a variety of sources to inform planning, management of resources, impact instruction and close achievement gaps (including disaggregated by sub-groups and groups of interest)

STANDARD 5: COMMUNICATION AND COMMUNITY RELATIONS

DESCRIPTORS

- Develops and implements effective and collaborative systems that engage multiple and diverse stakeholder groups.
- Engages and effectively communicates with diverse families, community partners and other constituencies to strengthen student learning.
- Cultivates relationships and partnerships with members of the business, civic and local government in support of their advocacy for charter school and community needs.
- Goes beyond the charter school and local community to advocate for students at the county, regional and/or state level.

ARTIFACTS

- Evidence of participation in community/school events
- Accounts of charter school accomplishments and communications in various forms of public media (including website, newsletters, podcasts, public engagement documents, etc.)
- Critical dates calendar (due dates, etc.) and board presentation cycle/annual reports
- Agendas and/or minutes (e.g., community planning, key communicators/advisory meetings, administrative team, curriculum team, collaborative group, stakeholder groups, charter school leadership team, etc.)
- Communication vehicles or methods that make the school vision visible to stakeholders including using technology, number of visits to website, etc.
- Formal or informal community partnership agreements and plans to support collaborative efforts to achieve charter school goals/priorities
- Memberships and participation with community organizations (e.g., PTA, city council, etc.)
- Participation in state, regional and national initiatives (documentation)
- Presentations to stakeholders (including civic groups, staff, parents, community groups, etc.)
- Response to public and/or stakeholder concerns/issues (documentation)
- Visible support for charter school goals and priorities from stakeholders and community leaders, such as the district, educational foundation, civic clubs, city council, etc.
- An internal or external communication plan
- Schedules of staff meetings, administrative council meetings, etc.

STANDARD 6: EFFECTIVE ORGANIZATIONAL AND CONTRACT MANAGEMENT

DESCRIPTORS

ARTIFACTS

- Implements equitable strategies, processes, and systems to recruit, hire, develop, and retain high-performing personnel who demonstrate a shared commitment to student success.
- Has a strong line of communication with the authorizer’s charter school liaison and proactively involves/informs the authorizer of any high-level information of which the authorizer should be aware.
- Creates and maintains organizational structures that maximize the charter school’s capacity to positively impact student learning.
- Understands the charter school’s responsibilities as defined in the charter contract. Ensures compliance with the contract, including timely submission of high-quality deliverables.
- Updates the board on contract compliance issues, renewal processes, and other pertinent information related to the charter contract and/or health of the organization.

- Staff recruitment and retention plan (including demographics to match student and community population)
- Hiring process (guidelines, procedures, schedules, plan for retention and recruitment, mentoring, focus on diversity, etc.)
- Staff attendance and retention rates
- Development plans for improving the capacity of leadership at all levels
- Documentation of coaching for instruction, curriculum, assessment, and inclusion
- Meaningful engagement of staff to improve cultural competency and equitable practice (documentation)
- Meaningful documentation of collaboration and/or communication with the authorizer
- Documentation of communication to the board about charter compliance, renewal, evaluation, and/or other pertinent information related to the charter contract.
- Documentation of understanding about the requirements of the charter contract. (e.g. reports from the authorizer, charter school evaluations, communication with the authorizer, board minutes, communication to families and other stakeholders, etc.)

STANDARD 7: EFFECTIVE FINANCIAL MANAGEMENT

DESCRIPTORS

- Develops a proposed budget in accordance with board priorities and charter school direction.
- Manages the equitable implementation of charter school resources aligned with the budget adopted by the board.
- Communicates the budget priorities and ensures regular updates on implementation of the budget.

ARTIFACTS

- Charter school budget reflects priorities and expectations
- Economic vision that includes participation with community development groups/stakeholders
- Enrollment trend forecasts
- External reviews and audits (e.g., budget, child nutrition, transportation, safety, etc.)
- Financial plan: end-of-year budget status report, three- to five-year plan, long-range plan, etc.
- Grants received/applied for that are aligned with goals of the charter school, plans for sustainability
- Program evaluations that address areas of interest or concern (e.g., outreach, equity, behavioral supports, bullying/harassment, character education, etc.)
- Construction project(s) management, including timelines, budgets, and implementation techniques
- Policies/procedures for management of funds and other resources to make progress or achieve charter school goals

STANDARD 8: POLICY, GOVERNANCE AND ADVOCACY

DESCRIPTORS

- Develops relationships, leads collaborative decision-making and governance, and represents and advocates for charter school needs in local, county and state policy conversations.
- Cultivates a respectful and responsive relationship with the charter school board focused on achieving the shared mission and vision of the charter school.
- Implements, maintains, and communicates charter school, state and national policy, laws, rules and regulations to staff, board, and other appropriate stakeholders.

ARTIFACTS

- Staff meeting agendas
- Board and administrative goals
- Board meeting agendas
- Timeliness of board packets
- Board policy and administrative regulation enforcement that is reflective of the vision with supporting materials
- Collaborative partners (documentation)
- Comprehensive charter school improvement plan
- External reviews and audits (e.g., authorizer evaluations.)
- Onboarding plan for board members to understand roles and responsibilities
- Meaningful interpretive reports of student achievement data delivered in accessible language
- Notes from state officials
- Participation in state, regional, national initiatives (documentation)
- State plans and reports (ELL, SPED, CIP, Title, etc.)
- State Report Card data (including disaggregated data by sub- groups and groups of interest)
- Work with local government on city/school initiatives (documentation)

APPENDIX D

PART 4

EVALUATION COMPONENT TARGETED FEEDBACK SURVEY

The targeted feedback survey (TFS) is an optional component meant to give the director and board additional feedback about the performance of the director. The process asks a targeted group of stakeholders for feedback via a survey, with questions tied to director performance standards and goals. The board and director should develop an agreed upon list of individuals that will receive the survey. An independent party should conduct the TFS and summarize the results of the survey to report back to the board.

Suggested participants in the TFS may include teacher leaders, confidential staff, families, and community leaders. Multiple participants reflect the collective wisdom of groups who work closely with the director. The feedback survey provides a variety of stakeholders an opportunity to share their understanding of how the leader of the charter school is performing. It is highly recommended that participants have regular interaction with the director in order to give helpful feedback via the survey.

STEPS FOR CONDUCTING A TARGETED FEEDBACK SURVEY

- **STEP 1**

It is recommended that the director and board work with an independent consultant to determine the questions for the feedback survey. The consultant should administer the survey and provide the results to the board. Questions should reflect the director's goals, performance standards and charter school priorities; these are unique to each charter school. If you purchase this service, OSBA will work with the board to develop questions appropriate for each group of participants, administer the survey, collect the data and provide the information to the board for consideration in their evaluation of the director.

- **PART 2**

The OSBA consultant will work with your board to develop questions for the TFS. The questions will be aligned to the standards in this workbook and should reflect the expected experience of each group being surveyed. For example, classroom teachers will have a different kind of communication with and access to the director than families will; it is critical that survey questions be appropriately tailored to each group. The board should mitigate barriers to accessibility for the survey, particularly with respect to language and access to technology.

- **STEP 3**

Select the participants to respond to the TFS. The participants should represent an appropriate range of constituent groups that have regular interactions with the director. Responses from participants should be anonymous. The number of participants should be manageable in terms of compiling the results.

- **STEP 4**

The OSBA consultant will distribute the feedback survey electronically with an introductory section explaining the purpose of the survey and assurance that the individual survey results are confidential. Approximately two to three weeks should be provided for survey responses to be completed. Frequent reminders may need to be sent to the survey group about completion of the survey.

- **STEP 5**

The OSBA consultant will review the survey results with the board in executive session, highlighting areas of strength identified in the survey and noting any areas for targeted focus and/or improvement.

- **STEP 6**

The board should utilize the survey results as one source of data when evaluating the director. This information should be considered along with the director's self-evaluation, artifacts of evidence, and board members' direct experience and observation of the director's performance.

APPENDIX E

PART 5

SAMPLE EVALUATION SUMMARY

Below is a sample summary of a board's evaluation of its director.

The board of directors of the (name) charter school has completed the annual evaluation of Director (name) for (year). All (number) board members have served on the board for at least one full year and have been able to observe and be a part of the successes achieved this year.

The evaluation focused on 1) eight professional standards and 2) director goals.

Regarding the eight professional standards, we determined that Director (name)'s performance was exemplary in the areas of visionary leadership, communications and community relations, and effective management. In the areas of policy, governance, and advocacy, effective financial management, and communication and community relations, the board felt his/her performance was strong. Culturally responsive instructional leadership and improvement, inclusive school culture, effective organization and contract management, and ethics and professional norms all received a rating of average.

The board determined that Director (name) has done an outstanding job of attaining the goal set by the board and director in August of last year to update and align the elementary language arts and reading curriculum. His/her success at achieving the goal of improving staff morale and retaining professional staff was rated good. Success in meeting the third goal, raising high school math competency and performance on tests, was also rated good.

[The board and director chose to distribute a targeted feedback survey to members of the staff and community for feedback on his/her performance. The results of this survey were one source of data in the consideration of the performance of the director. We have received the results of that feedback, which reflects that staff morale has improved and that significant curriculum results have been achieved at the elementary level. He/she also shared with us his/her desire to further improve staff morale and focus on bringing the community together in support of the school.]

We will be working with Director (name) over the next several weeks to develop goals for the director aligned with our charter school goals and look forward to working together to continue the success of our charter school.



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