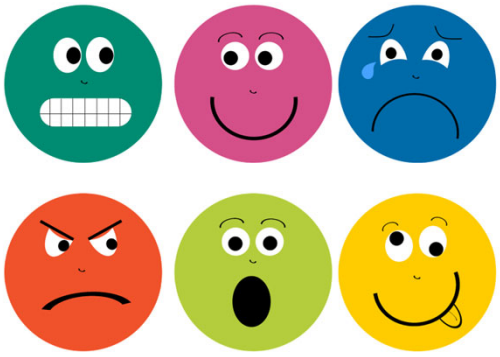
## Any Feelings About Evaluation?

MASB

When I think about evaluating the superintendent, I feel . . .

- Uncertain of how to evaluate a trained, professional educator
- Concerned about open, honest dialogue
- Don't like conflict
- I'm fine with it!



The Superintendent Evaluation Process
*Strengthening the Board-Superintendent Relationship*
Illinois School Board Association, 2014

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## Relevance to You

- Reduce confusion and tension among board members and with the superintendent
- Keep the focus on what is most important for your students in your district
- Be confident that you are executing your duties properly and living up to the trust your community has placed in you
- Limit the risk of lawsuit to the school district

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## Evaluation Should be Developmental

- A good evaluation process will help to further develop knowledge and skills of the Superintendent
- Performance expectations can be clarified and prioritized
- It provides mechanism for feedback, which is both appreciated and valuable
- It links superintendent's work to district goals

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## Learning Targets

- Understand Board requirements and requirements in the law
- Describe indicators of superintendent job performance
- Identify possible artifacts and evidence
- Establish and plan for a rational cycle and check points
- Understanding of how to collectively rate the performance of a superintendent using the MASB Superintendent Evaluation Tool
- Practice using the evaluation criteria to establish consistency in evaluators to satisfy the calibration requirement for board members

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## Board Requirements

- The Board as a whole, provides oversight and governance to the District, generally speaking as ONE VOICE.
- The Board evaluates only ONE employee
- The Board evaluates the superintendent's performance annually using a research-based tool and it is reported in the REP (Register of Educational Personnel)
- The Board is required to have TRAINING on this process and rater reliability

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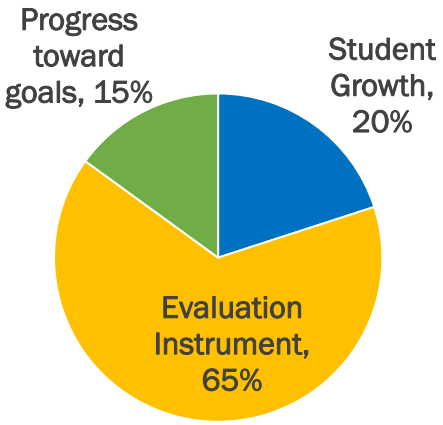
## The Law

- Evaluate superintendent annually
- Assign a rating of effective, developing, or needing support
- Hold a Mid-Year Progress Report Review each year the superintendent is evaluated

## Composition of the MASB Tool

- The law specifies that 20% of the tool is student growth and assessment data or student learning objectives metrics
- The rest of the tool must be "objective criteria"
- The MASB tool specifies that 65% is professional practice (research based)
- The MASB tool specifies that 15% is progress on goals (defined by the district and superintendent)

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## Student Growth and Assessment Data

- Must include multiple rating categories with student growth and assessment data, or student learning objectives metrics, or combination of both
- Decided locally
- It may be appropriate to aggregate from building/teacher level to district level (utilize teacher measures aggregated up to the superintendent)

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## Student Growth

- Student growth measures the amount of student academic progress between two points in time.
- The data considered must be from a single group of students:
  Last year's 4th graders ►
  This year's 5th graders
- Student Growth is different than Student Proficiency

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## Student Learning Objectives

- Measurable, long-term academic goals
- Informed by available data
- Teacher or teacher team sets at the beginning of the year for all students

## Legal Requirement - Mid-Year Progress Report

- Superintendent is provided a midyear progress report each year that they are evaluated to gauge improvement from the preceding evaluation and to assist with improvement.
- The midyear progress report must include:
  - Specific performance goals for the remainder of the calendar year
  - Goals should be developed consulting with the Superintendent
  - Include any recommended training identified that would assist in meeting these goals.
- A written improvement plan is provided that includes these goals and training and is designed to assist in improving performance

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## Legal Requirement - Training

- All evaluators of administrators are to be provided Rater Reliability Training by September 1, 2024 and every 3 years thereafter that includes:
  - Clear and consistent set of evaluation criteria that all evaluators can use when assessing performance.
  - Clear expectations for what evaluators should look for when assessing performance, including identifying key behaviors and practices that are associated with effectiveness.
  - Training on the evaluation process itself
  - Calibration exercises that help evaluators practice using the evaluation criteria and establish consistency in the evaluator's evaluations.
  - Ongoing support for evaluators, including feedback and coaching to help the evaluators improve their skills and ensure they are consistently applying the evaluation criteria

## Legal Requirement - Unevaluated

Designated as UNEVALUATED:

- The Superintendent worked less than 60 days in that year.
- The Superintendent's evaluation results were vacated through the appeal process.
- There are extenuating circumstances and the Superintendent, and the school district agree to designate the Superintendent as unevaluated because of the extenuating circumstances.

If a Superintendent is designated as UNEVALUATED, the Superintendent's rating from the year immediately before that designation must be used if both of the following are met:

- The Superintendent is in the same position in the year before the Superintendent received the unevaluated designation.
- The Superintendent continues to be employed by the same school district as the year before

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## Legal Requirements

Rated effective (or HE) on three consecutive annual evaluations:

- Board may choose to conduct an evaluation biennially instead of annually
  - Off years still report as effective in the REP
  - If evaluation slips below effective, or if evaluator changes, the evaluation must be conducted annually

Rated as Developing or Needing Support:

- Board must develop and require the Superintendent to implement an Improvement Plan to correct deficiencies
  - The improvement plan must recommend professional development opportunities and other actions designed to improve the rating of the Superintendent on the Superintendent's next evaluation

## Legal Requirements

- The CONTRACT governing the employment of a superintendent must include an appeal process concerning the evaluation process and rating received

DON'T FORGET that the evaluation process also must comply with:

- The Open Meetings Act – the evaluation can be done in closed session at the superintendent's request
- The Freedom of Information Act – the final evaluation approved in open session will be subject to FOIA

## Required Postings on District Website

- ✓The research base for the evaluation system
- ✓The identity and qualifications of the author or authors
- ✓Either evidence of reliability, validity and efficacy or a plan for developing that evidence
- ✓The evaluation frameworks and rubrics with detailed descriptors for each performance level on key summative indicators
- ✓A description of the processes for collecting evidence, conducting evaluation conferences, developing performance ratings and developing performance improvement plans
- ✓A description of the plan for providing evaluators with training

Simply link to http://www.masb.org/postingrequirements

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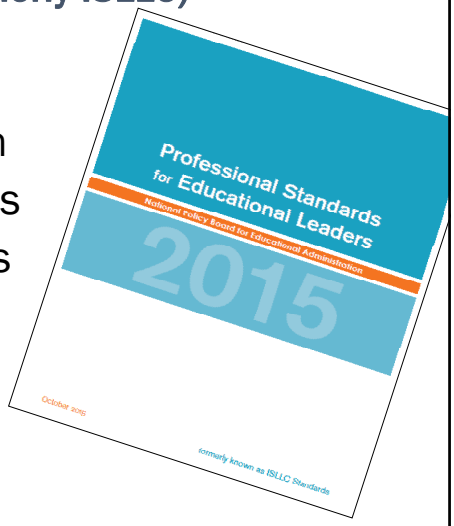
## Research Based:

## What Do Effective Superintendents Do?

## Professional Standards for Educational Leaders (2015) (formerly ISLLC)

- Two-year process
- Substantial involvement of the profession
- Over 1,000 practicing educational leaders
- NSBA, AASA, NAESP, NASSP contributions
- Extensive review of research
- Multiple committees
- Vetting and public comment




National Policy Board for Educational Administration

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## Standards – *The Drivers*

### Standard 1. Mission, Vision and Core Values

- Effective educational leaders develop, advocate and enact a shared mission, vision and core values of high-quality education, academic success and well-being of *each* student.

### Standard 2. Ethics and Professional Norms

- Effective educational leaders act ethically and according to professional norms to promote each student's academic success and well-being.

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## Standards – *The Drivers*

### Standard 3. Equity and Cultural Responsiveness

- Effective educational leaders strive for equity of educational opportunity and culturally responsive practices to promote each student's academic success and well-being.

### Standard 10. School Improvement

- Effective educational leaders act as agents of continuous improvement to promote each student's academic success and well-being.

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## Standards – *The Core*

### Standard 4. Curriculum, Instruction and Assessment

- Effective educational leaders develop and support intellectually rigorous and coherent systems of curriculum, instruction and assessment to promote each student's academic success and well-being.

### Standard 5. Community of Care and Support for Students

- Effective educational leaders cultivate an inclusive, caring and supportive school community that promotes the academic success and well-being of each student.

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## Standards – *The Supports*

### Standard 6. Professional Capacity of School Personnel

- Effective educational leaders develop the professional capacity and practice of school personnel to promote each student's academic success and well-being.

### Standard 7. Professional Community for Teachers and Staff

- Effective educational leaders foster a professional community of teachers and other professional staff to promote each student's academic success and well-being.

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## Standards – *The Supports*

### Standard 8. Meaningful Engagement of Families and Community

- Effective educational leaders engage families and the community in meaningful, reciprocal and mutually beneficial ways to promote each student's academic success and well-being.

### Standard 9. Operations and Management

- Effective educational leaders manage school operations and resources to promote each student's academic success and well-being.

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## Second Study - School District Leadership That Works

Mid-Continent Research for Education and Learning

- Meta-analysis (research on the research)
- 27 studies - 2,817 districts and 3.4 million students

KEY FINDING

District-level leadership and length of superintendent tenure has an impact on student achievement

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## Key Finding - Collaborative Goal-Setting

- Effective superintendents include all relevant stakeholders, staff, board, and administrators in establishing district goals, achievement and instructional goals and monitoring these goals to ensure that they are the driving force behind district actions.

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## Key Finding - Board Alignment & Support

In districts with higher levels of student achievement, the local board of education is aligned with and supportive of the goals.

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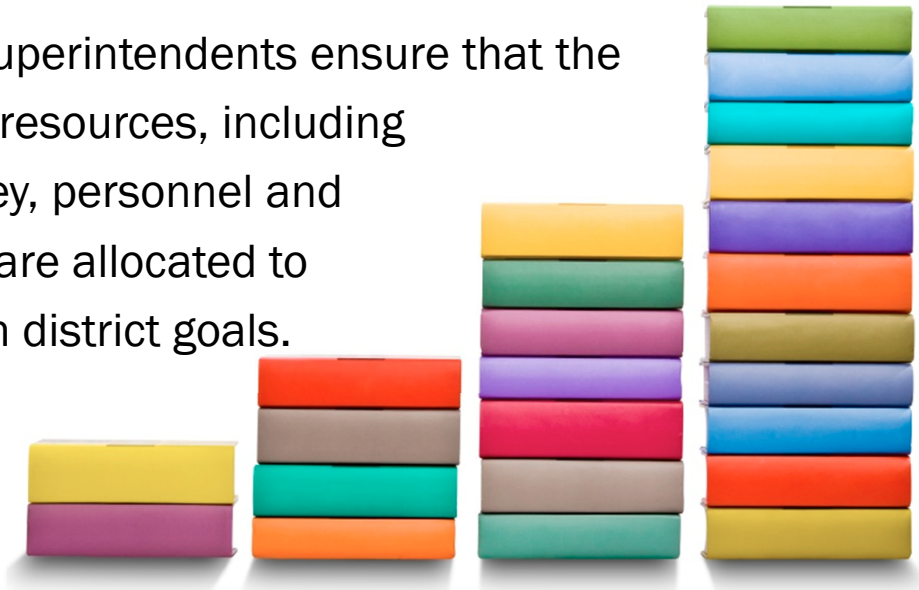
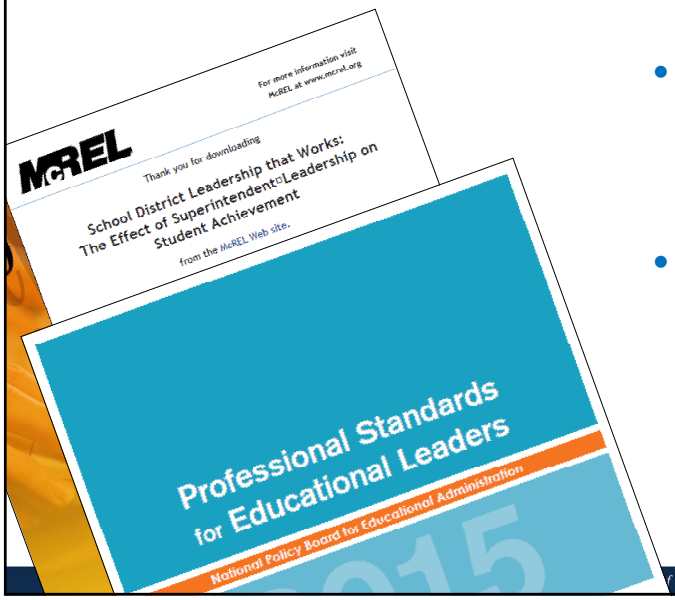
## Key Finding - Use of Resources

Effective superintendents ensure that the necessary resources, including time, money, personnel and materials, are allocated to accomplish district goals.



## Research Base




- 30 years of research on the practices and behaviors of superintendents
- MASB's evaluation instrument is based on what we know effective superintendents do

## Understanding & Using the Instrument

## Performance Categories

- Governance & Board Relations
- Community Relations
- Staff Relations
- Business & Finance
- Instructional Leadership

## Rubrics

- Lists a set of criteria, which defines and describes the important components of the work being evaluated
- Each specific indicator of performance is in each box
- The evaluation process is more objective with defined rubrics
- Provides a road map for the superintendent

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**A. Governance & Board Relations** — Weight: 20%

Performance Category

| | | Needing Support (1 pt) | Developing (2 pt) | Effective (3 pt) | Rating |
|---|---|---|---|---|---|
| A1 | **Policy Involvement** Professional Standards for Educational Leaders: 2, 9 | Makes decisions without regard to adopted policy. | Provides correspon ence from policy provider with reco endation(s) for adoption. F | Is actively involved in the development, recommendation and administration of district policies. | |
| A2 | **Goal Development** Professional Standards for Educational Leaders: 1, 9, 10 | Goals are not developed. | Goals are defined by implementing state curriculum and seeking to maximize student scores. | Facilitates the development of short-term goals for the district and reports goal progress to board. Provides the necessary financial strategies to meet those goals. Budget practices help to ensure alignment of resources to goals. | |
| A3 | **Information** Professional Standards for Educational Leaders: 2, 7, 9 | Does not provide the information the board needs to perform its responsibilities. | Keeps only some members informe making it difficult for the board to perform its respo | Has established mutually agreed upon protocols that consistently keeps all board members informed with appropriate information as needed so the Board may perform its responsibilities. | |
| A4 | **Materials and Background** Professional Standards for Educational Leaders: 7, 9 | Meeting materials aren't readily available. Members arrive at meetings without enough prior information regarding agenda or background information. | Meeting materials are incomplete, and don't include adequate background in perspective. | Meeting materials are provided with adequate background and historical perspective included. Recommendations are well thought out. | |
| A5 | **Board Questions** Professional Standards for Educational Leaders: 2, 7, 9 | Board questions aren't answered fully nor in a timely manner. | Most board questions are answered. All members aren't apprised of all relevant questions/answers. | Board questions are addressed with follow-up to all board members. | |
| A6 | **Board Development** Professional Standards for Educational Leaders: 6 | Doesn't promote and does not budget for board development. | When prompted, provides members with information about board development. | Actively encourages board development by providing board members with information regarding board development opportunities when they arise. Ensures funding is available and aligned to board development plan. | |
| | | | | **Category rating:** | #DIV/0! |

Performance Level

Performance Indicator

Progressive Performance Level Language

**Artifacts that may serve as evidence of performance in this domain:**

- Meeting agendas/minutes
- Board packets
- Board development materials
- Memos/communications
- Board policies/policy book
- Retreat agendas/minutes
- Board development plan
- Communication protocols
- Policy review calendar

# Rubric Exploration - A

- Review the subcategories in A. Governance & Board Relations
  - Policy Involvement, Goal Development, Information
  - Materials and Background, Board Questions, Board Development
- Review the progressive performance language.
- The Board Relations category is more familiar to Board members regarding performance and evidence
- What are some examples of evidence indicating performance for any of the areas?

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## Rubric Exploration - B

- Review the subcategories in B. Community Relations
  - Communication with Community/Parents,
  - Community/Parent Input, Media Relations, District Image,
  - Approachability
- Review the descriptors for each rating.
- Again, notice the progressive performance language.
- What are some examples of evidence indicating performance for any of the areas?

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## Rubric Exploration - C

- Review the subcategories in C. Staff Relations
  - Staff Input, Staff Communication, Delegation of Duties,
  - Personnel Matters, Recruitment, Labor Relations,
  - Visibility in District
- Review the descriptors for each rating.
- What are some examples of evidence indicating performance for any of the areas?

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## Rubric Exploration - D

- Review the subcategories in D. Business & Finance
  - Budget Development, Budget Reporting, Financial Controls
  - Facility Management, Resource Allocation
- Review the descriptors for each rating.
- What are some examples of evidence indicating performance for some of the areas?

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## Rubric Exploration - E

- Review the subcategories in E. Instructional Leadership
  - Performance Evaluation System, Building Level Leadership
  - Staff Development, Curriculum, School Improvement
  - Instruction, Student Voice, Support for Students
  - Professional Knowledge
- Review the descriptors for each rating.
- What are some examples of evidence indicating performance for any of the areas?

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# The Importance of Evidence

## Evidence

- Evidence and artifacts can be used to illustrate performance
- Helps to reduce bias and subjectivity in performance evaluation

| | | | | |
|---|---|---|---|---|
| A6 | **Board Development** Professional Standards for Educational Leaders: 6 | Doesn't promote and does not budget for board development. | When prompted, provides members with information about board development. | Actively encourages providing board mem regarding board dev they arise. Ensures f to board developme |

**Artifacts that may serve as evidence of performance in this domain:**

- Meeting agendas/minutes
- Board packets
- Board development materials
- Memos/communications
- Board policies/policy book
- Retreat agendas/minutes
- Board development plan
- Communication protocols
- Policy review calendar

Artifacts that may serve as evidence

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## Evidence

- Items generated by the superintendent can provide evidence of meeting the goals and objectives
- The Board can work with the superintendent to determine the amount of evidence and sources of data to be used
- Multiple styles of reporting and sources of data can be used

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## Calibration Exercise – Policy Involvement

- Evidence provided includes:
  - Attendance at policy committee meetings
  - Proactive regarding certain new issues to develop into policies
  - Holds meetings for adjusted and new policies due to law changes
  - Policy approval process is thorough and timely
  - Reviews new/adjusted policies with board and administration
  - Effective dissemination of policies to staff
- Review the descriptors for each rating in “policy involvement”.
- What does the evidence along with the rubric indicate the rating should be?

## Calibration Exercise – Budget Reporting

- Evidence provided includes:
  - No regular budget reporting is done at the board level
  - "Budget to actual" reports are not readily available
  - Audit has issues and management concerns
  - Unsure of status of finances when requested by Board
- Review the descriptors for each rating in "Budget Reporting".
- What does the evidence along with the rubric indicate the rating should be?
- Ongoing support for evaluators, including feedback and coaching to help the evaluators improve their skills and ensure they are consistently applying the evaluation criteria

## Calibration Exercise – Staff Input

- Evidence provided includes:
  - Staff perception survey is sent out, but results are not consistently utilized to adjust any practices
  - Staff meetings are held on a regular basis
  - Curriculum review process includes staff members, but their ideas are utilized inconsistently
- Review the descriptors for each rating in "staff input".
- What does the evidence along with the rubric indicate the rating should be?

# Aspects of the Evaluation Cycle

## Planning

Mutually agree upon:

- Evaluation timeline and key dates
- Performance expectations, district goals, priorities
- Checkpoints (formal and informal) MID YEAR REQUIRED
- Evidence and any artifacts to indicate superintendent performance
- Review the process for completing the year-end evaluation

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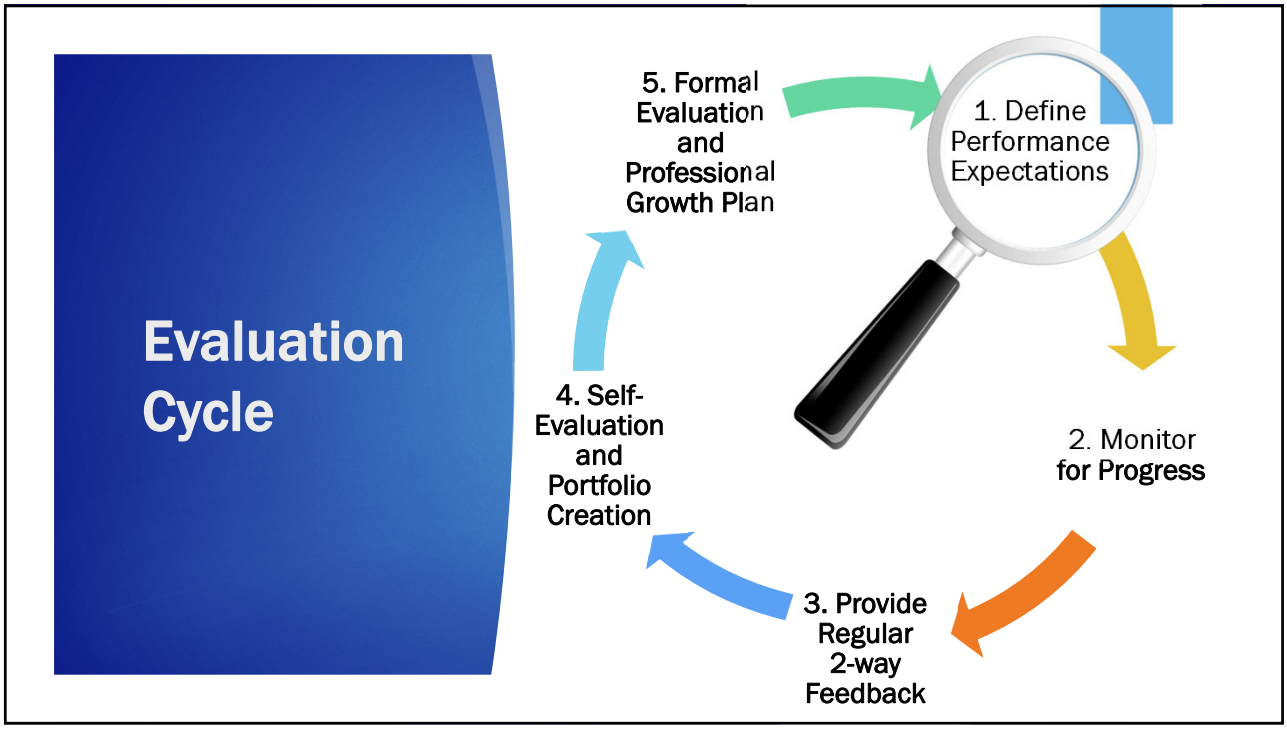


## Performance Expectations

- Clarify Board expectations for the Superintendent
- Review district goals and priorities for the work
- Review any benchmarks anticipated or desired
- Review the MASB tool for any clarifications on the various areas
- Document the artifacts/evidence/agreements as discussed

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## Performance Expectations

Superintendents and Boards must ensure they have clarity on the following:

1. Performance Indicators in the Rubrics (Categories A-E)
2. Student Growth and Assessment (Category G)
   - *How will you measure student growth and assessment or Student Learning Objectives? (Hint: How is your district measuring this for teacher evaluations?)*
3. Progress on Goals (Category G)
   - *How will you measure progress towards goals?*

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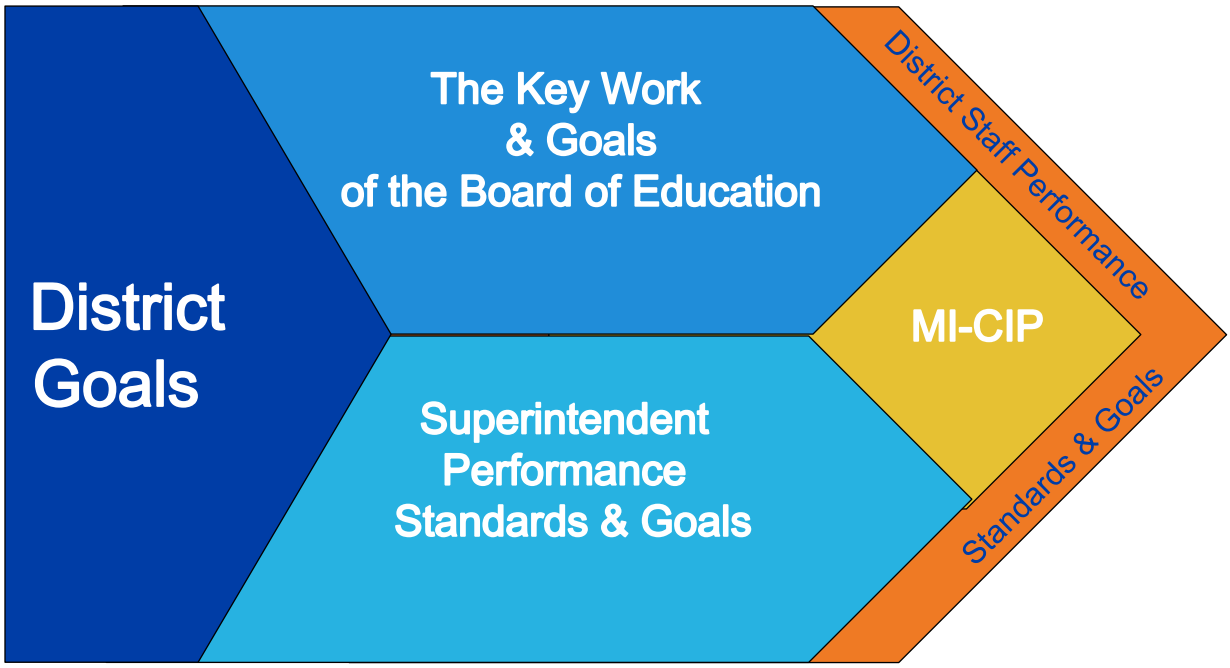

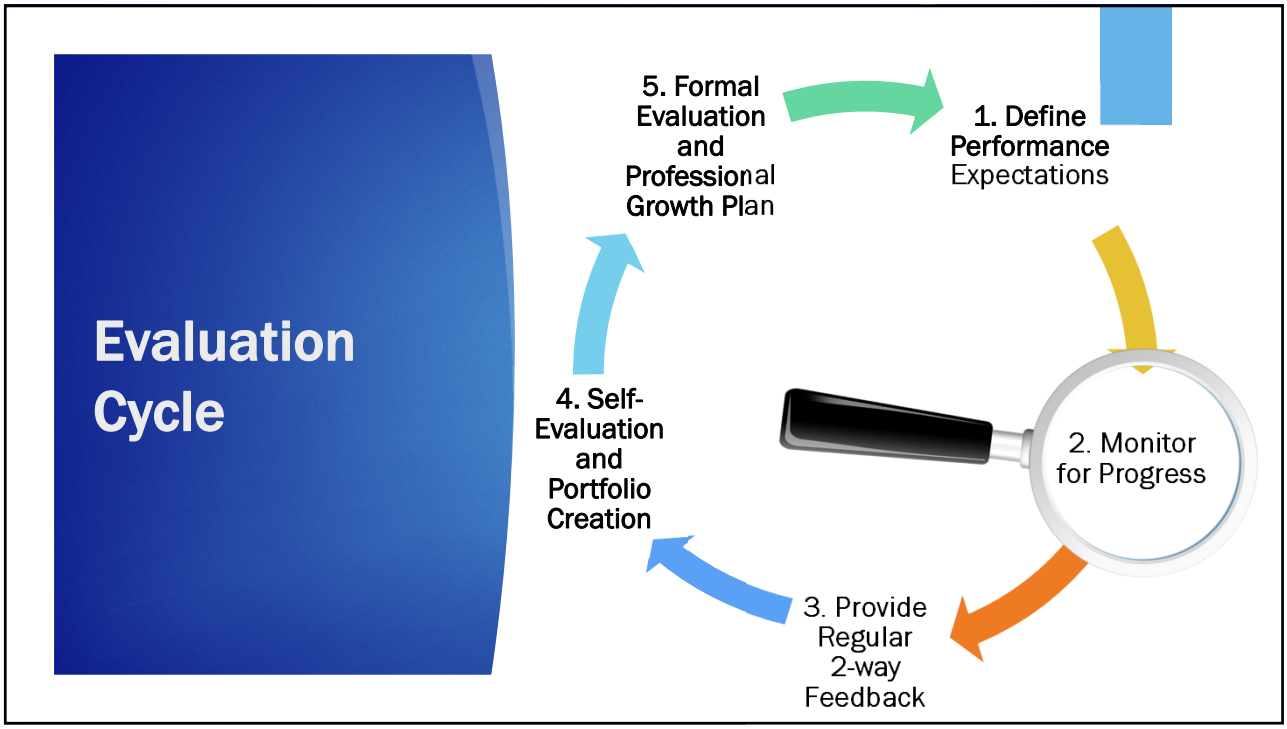


## Monitoring for Progress

- Have logical checkpoints been identified? Quarterly?
- Conversation about performance – closed session at request
- How will progress be measured?
- What is the baseline (starting point) measurement?
- When will data be available to check on progress?
- What is the expected change?
- Midyear Progress Report is required

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## Mid-Year Progress Report

- Schedule this meeting date about halfway through the evaluation year
  - Gauge improvement from the preceding evaluation and assist with improvement going forward
- Discussion of progress toward goals and superintendent performance can be done in closed session at request
- Discussion of GOALS must be done in open session and you can include what evidence will be used to measure progress

- Written improvement plan required:
  - Specific performance goals for the remainder of the calendar year
  - Include any recommended training identified that would assist in meeting these goals
  - Consider what evidence will be used to measure progress

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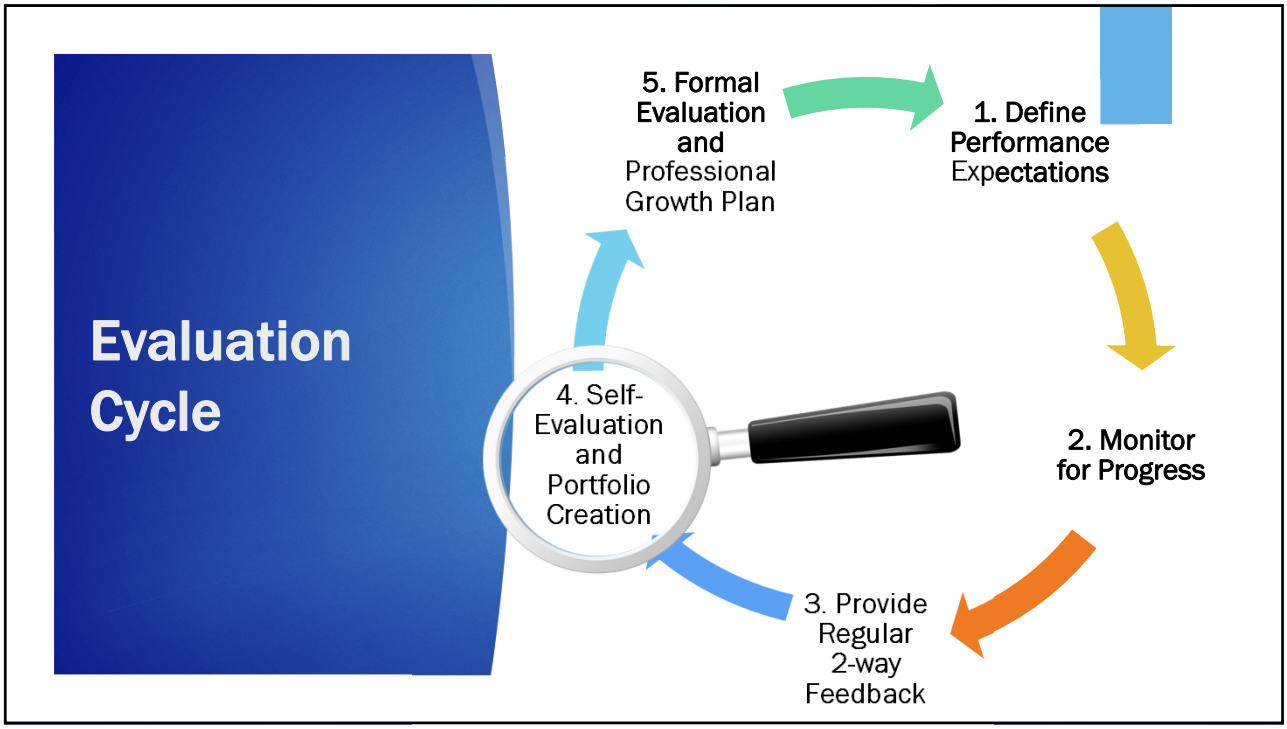

## Superintendent Self-Evaluation

- The superintendent evaluates themselves using the evaluation instrument.
- They compile data related to and evidence of performance.
- The superintendent shares this information with the board prior to the board beginning to work on the year-end evaluation.

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## How to Process a Self-Evaluation

- Be open to the information being shared.
- Provide the information and superintendent the regard appropriate for an evaluation.
- Read through the evaluation, comments and the evidence provided.
- Ask questions about any items that require clarification.

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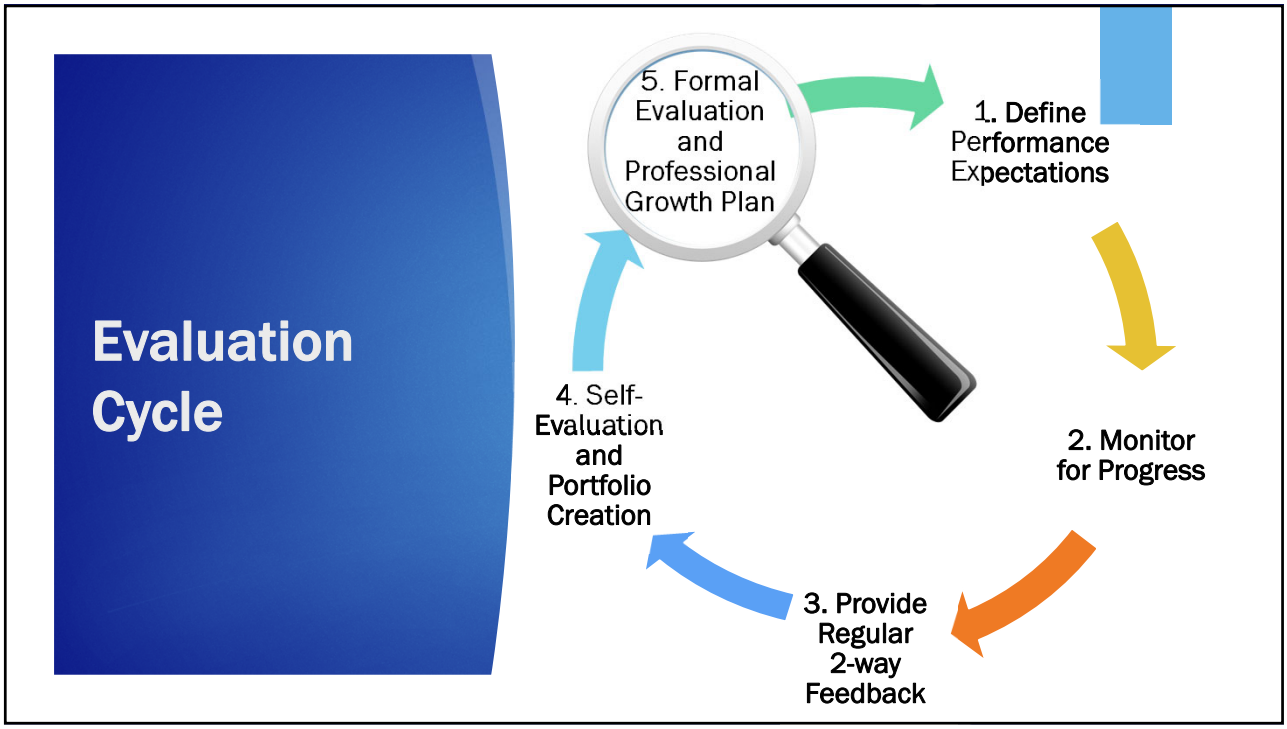


## Formal Final Year-End Evaluation

The Board completes the final year-end evaluation of the superintendent speaking as ONE VOICE to the superintendent regarding their performance using a consensus model.

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## Evaluation Process Summary

- Superintendent prepares self-evaluation and evidence
- The Board holds a self-evaluation meeting
- The Board holds the final evaluation consensus meeting
- The Board approves the completed evaluation in open session
- The District reports the rating in the Register of Educational Personnel (REP)

## Self-Evaluation and Evidence Meeting

- This meeting can be held in closed session by request of superintendent
- Superintendent prepares self-evaluation, compiles evidence and provides to Board of Education.
- Board members seek clarity as needed regarding self-evaluation or evidence provided.
- Board of Education members receive blank evaluation instrument and make individual notes about their observations.
- After reflection, board members fill out their own ratings on the evaluation instrument to prepare for consensus meeting

## Consensus Meeting

*Note: MASB recommends the superintendent remain in the room while the board discusses their performance.*

- This meeting can be held in closed session by request of superintendent
- Board president or facilitator reviews with Board members their ratings in each area along with the self-evaluation and evidence provided and facilitates conversation with members about their ratings of performance in each area.
- After discussion and consensus, a score is assigned for each area. A rating is required in all areas.

## Closed Meeting Exception

- "A public body may meet in a closed session…to consider a periodic personnel evaluation of a… staff member…if the named person requests a closed hearing."
- "Person requesting a closed hearing may rescind the request at any time, in which case the matter at issue shall be considered after the rescission only in open session." MCL 15.268(a)

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## Closed Meeting Exception

**OPEN PHASE**

- Scheduling the evaluation
- Choosing and modifying the evaluation instrument
- Establishing performance goals or expectations
- Determining process for the evaluation
- Adoption of the completed evaluation
- Voting to go into closed sessions
- Training on the evaluation tool
- Related board actions and discussions

**CLOSED PHASE**

**** if requested by employee****

- Discuss & deliberate about the evaluation/performance of the superintendent

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## Consensus

- Boards should use a consensus model for completing the summative evaluation.
- Board members discuss each performance indicator and settle on a score they can all *live with*.
- Each consensus score is entered on the form and then those scores form the calculation of each domain.
- Each domain score transfers to the final calculation page.

## The Problem with Averaging

- MASB cannot ensure reliability of the instrument when scores are averaged.
- Averaging 5/7/9 board member scores does not reflect the view of the Board of Education.
- Averaging does not provide clear direction to the superintendent.

## Consensus Meeting Continued

- Upon completion of a score in each area of the five domains, the excel instrument will calculate an overall professional practice score.
- Board reviews evidence provided related to student growth and assessment and assigns score via consensus
- Board reviews progress toward district-wide goals and assigns score via consensus.

## Calculation and Comments

The excel instrument will calculate the overall evaluation score including professional practice, student growth and assessment, and progress toward district-wide improvement goals.

Comments can be included in each section and any themes/trends identified by the Board may be added to the summary page

## Approving the Evaluation

*Board needs to leave closed session and reconvene in open session:*

- The board president comments:
  - A motion is needed to approve the superintendent evaluation as presented (or as completed in closed session).
- After receiving motion and support, board president calls for a vote to adopt the completed year-end evaluation for the superintendent.
- After approval, the board president can announce the overall rating earned by the superintendent.
- The Board president can work with the superintendent to coordinate public statement about the superintendent evaluation.

## After the Approval in Open Session

*After the meeting:*

- After approval of the evaluation, the superintendent may add comments if desired (this is allowable, not necessarily recommended)
- Two copies are made of the evaluation, the superintendent and board president sign the evaluation copies
- One copy goes into the personnel file and the other copy goes to superintendent
- The evaluation rating is reported by the District in the REP (Register of Educational Personnel). The REP is opens in June and closes on June 30.

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## Establishing and Using a Calendar

## Possible Cycles

| January – December | | July – June [Recommended for ISDs/ESAs] | | April-March | |
|---|---|---|---|---|---|
| Activity | Month | Activity | Month | Activity | Month |
| Instrument, process, timeline and goals mutually established | January | Instrument, process, timeline and goals mutually established | July | Instrument, process, timeline and goals mutually established | May |
| Informal update | April | Informal update | October | Informal update | August |
| Mid-Year Progress Report | June | Mid-Year Progress Report | December | Mid-Year Progress Report | October |
| Informal update | August | Informal update | February | Informal update | December |
| Annual evaluation | November | Annual evaluation | May | Annual evaluation | March |
| Advantage: Aligns with election cycle. Board members who establish goals are generally the same board members evaluating performance. | | Advantage: Aligns with the school year. Is compatible with natural flow of the school year as well as evaluation cycle for other employees. | | Advantage: Aligns with contract renewal cycle in many cases. Boards of Education must provide superintendents 90 days' notice in the event of nonrenewal of contract. | |

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## Items Needed at Beginning of Cycle

- ☑ Board Planning Calendar for Evaluation Process
- ☑ Blank Copy of Evaluation Instrument
- ☑ Superintendent Goals and/or District Goals/Strategic Plan
- ☑ Student Growth and Assessment Model
- ☑ Superintendent Contract
- ☑ Any Board Policies or Procedures that Relate to Superintendent Evaluation
- ☑ Superintendent's Job Description (policy regarding superintendent position if available)

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## Planning

- Beginning of Cycle – Workshop (60-90min.)
  - Expectations
    - What do we expect to be accomplished?
    - What are our indicators of success?
    - What evidence will we expect to see?
  - Document
    - Document mutually agreed upon expectations, indicators and evidence
  - Schedule
    - All dates

**JANUARY**

- Expectations
- Schedule

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## Informal Check In

Informal Update (30 Minutes)

- Superintendent provides a brief update to the board on progress and indicators of success
- Board members ask any specific questions and offer input on status and progress to date

**APRIL**

Informal Update

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## Check-In Framework

- Revisit the expectations the board established.
- Discuss the extent to which those expectations are being met.
- Inquire about barriers to progress as well as if/how they may be removed.
- Feedback can be framed in simple terms:
  - *Continue to do…Do more of…Do less of…*

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## Mid-Year Progress Report Review

- Workshop (60 minutes) – closed session at request
  - Board president provides questions from the board members to the superintendent ***prior*** to the meeting
  - Superintendent provides an update on various areas and progress toward goals
  - Board seeks clarification if needed
  - Go into open session to discuss goals for remainder of evaluation year
  - Written report including goals and any training needed

**JUNE**

Formal Discussion

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## Informal Check In

- Informal Update
  - Similar to previous check in
  - Greater focus on status of district goals
  - Update on new school year initiatives
  - Enrollment, funding projections

**AUGUST**

Informal Update

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## Year-End Evaluation

- Formal Evaluation
  - Superintendent conducts self-evaluation; presents portfolio with evidence
  - Board members review portfolio *prior* to evaluation
  - Seek clarification as needed
  - Board reviews expectations and conducts evaluation via consensus
  - Open, constructive discussion centered on growth

**NOVEMBER**

Evaluation

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## Ongoing Support

- How do we provide ongoing support for evaluators?
- How do we provide feedback and coaching to help the board members improve their skills?
- Can we improve our skills to consistently apply the evaluation criteria to performance and utilizing evidence along with the rubric to determine a rating?
- New board members must get this training regarding the evaluation process and rater reliability and also review the expectations that were established for the superintendent and evaluation process prior to trying to do the evaluation of the superintendent

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## Did We Accomplish the Learning Targets?

- Understand Board requirements and requirements in the law
- Describe indicators of superintendent job performance
- Identify possible artifacts and evidence
- Establish and plan for a rational cycle and check points
- Understanding of how to collectively rate the performance of a superintendent using the MASB Superintendent Evaluation Tool
- Practice using the evaluation criteria to establish consistency in evaluators to satisfy the calibration requirement for board members

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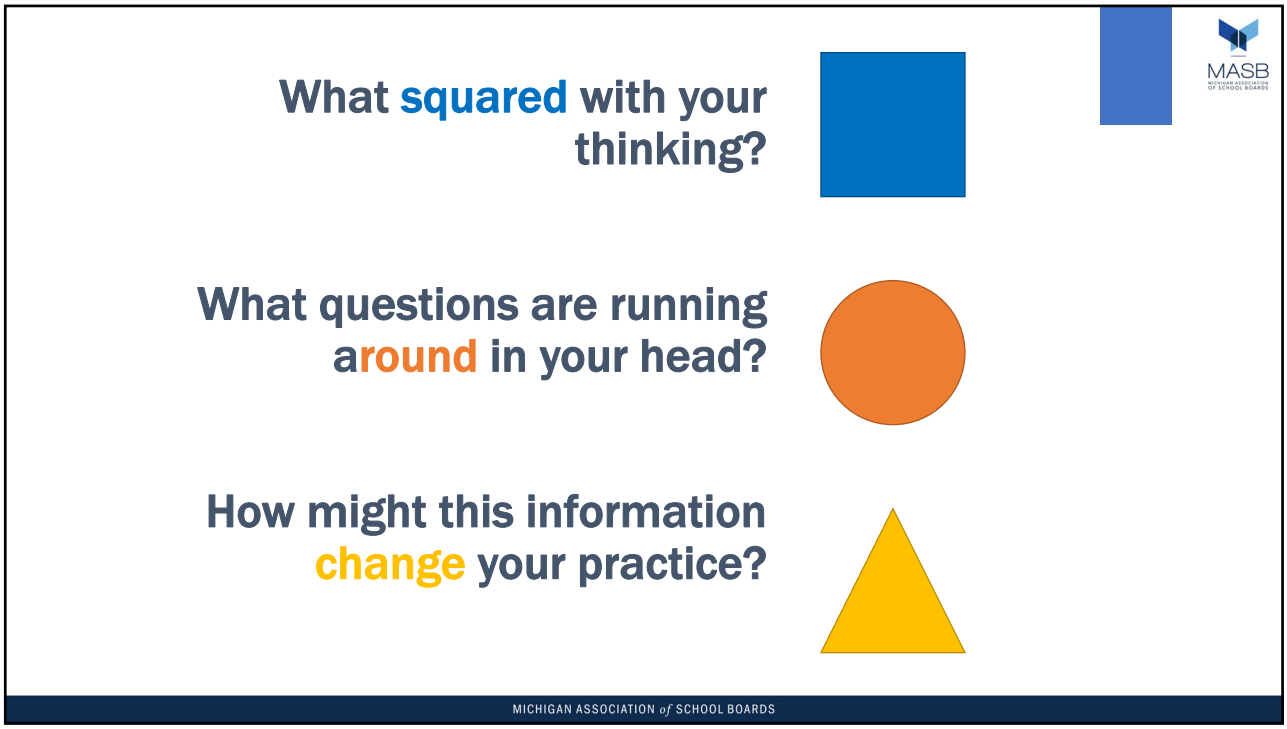
What squared with your thinking?
What questions are running around in your head?
How might this information change your practice?
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