



## GSBA Board/Leadership Team Self-Assessment Checklist

- Instructions:**
1. The BOE uses this checklist to assess its performance.
  2. This checklist provides a way for the BOE to cross check its performance with that of the superintendent's role in the leadership team.

### I. Vision/Philosophy/Goals

Sat	NI	DK	Board Indicators		Sat	NI	DK	Superintendent Indicators
			A. The board, along with the superintendent, has reviewed and readopted the written district's vision statement in a three-year cycle.					A. The superintendent will provide leadership to the board in its adoption of its district vision statement.
			B. Annually the board with superintendent's assistance has reviewed and readopted the district's mission statement.					B. The superintendent will provide leadership to the board in its adoption of its mission statement.
			C. Annually the board with superintendent's collaboration has reviewed and adopted the board and district goals.					C. The superintendent will provide system data and leadership to the board in its adoption of board and district goals.
			D-1. The board has adopted a calendar that monitors action plans with periodic superintendent updates and is presented at regular board meetings.					D-1a. The superintendent develops action plans with expected performances on the agreed upon goals. D-1b. The superintendent develops an activities calendar indicating timelines on each of the action plans. D-1c. The superintendent develops periodic written reports that follow the board-meeting calendar.
			D-2. The board has delegated to the superintendent the authority to administer and evaluate the adopted action plans.					D-2. The superintendent, under the board's delegated authority, either personally or by assuring their administration through delegated staff, administers and evaluates the adopted action plans.

Legend: Sat = Satisfactory; NI = Needs Improvement; DK = Don't Know; Next Yr. Priority = Is this a priority area that the board and/or superintendent should address next year?

		D-3. The board and superintendent have mutually agreed which goals and expected performances will be included in the superintendent's formal evaluation.				D-3. The superintendent and board have mutually agreed which goals and expected performances will be included in the superintendent's formal evaluation.
		D-4. The superintendent's evaluation instrument for the current year has been developed and mutually adopted.				D-4. The superintendent mutually agrees with the superintendent's evaluation instrument for the current year.

Board Comments	Next Yr. Priority	Superintendent Comments	Next Yr. Priority

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### II. Systematic Improvement

Sat	NI	DK	Board Indicators	Sat	NI	DK	Superintendent Indicators
			A. Each board member participates in the required training and professional development that meet or exceed requirements of Georgia law.				A. The superintendent assists the board to meet or exceed the required training requirements of Georgia law.
			B. The board annually evaluates its performance in fulfilling the Board's duties, responsibilities, and the Board's ability to work as a team.				B. The superintendent annually evaluates his/her performance in fulfilling the duties, responsibilities, and ability to work as a team member with the board.
			C-1. The Board of Education and the Superintendent meet in a retreat environment to review:				C-1. At least twice each year, the Board of Education and the Superintendent conduct a planning retreat in which the Superintendent prepares reports and presents evidence on:
			· progress made and revise action plans to accomplish district's vision/philosophy/goals (see I. of Standards)				· progress made and revise action plans to accomplish district's vision/philosophy/goals (see I. of Standards)
			· the strengths and improvements needed in the school district				· the strengths and improvements needed in the school district
			· any compelling problem(s) or emerging issue(s)				· any compelling problem(s) or emerging issue(s)

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			· trends, opportunities and anticipated challenges in the school district					· trends, opportunities and anticipated challenges in the school district
			· its educational and leadership philosophy and performance					· the educational and leadership challenges in the school district
			· the GSBA's Standards checklist for board and superintendent					· the GSBA's superintendent Standards checklist
								· superintendent's goals for the next operational improvement cycle.

Board Comments	Next Yr. Priority	Superintendent Comments	Next Yr. Priority



## GSBA Board/Leadership Team Self-Assessment Checklist

### III. Organizational Structure

Sat	NI	DK	Board Indicators		Sat	NI	DK	Superintendent Indicators
			A-1. The board establishes and follows local policies, procedures, and ethical standards governing the conduct of the board and board members.					
			A-2. The board adopts, reviews annually and follows a Code of Ethics for the board and board members.					A-2. The superintendent follows the Educator Code of Ethics.
			B. The board has adopted policies defining the election and responsibilities of the officers of the board.					
			C. The board uses the superintendent as its chief executive officer and delegates authority to administer district affairs.					C. The superintendent operates as the district's chief executive officer to administer district affairs.
			D. The board organizes and distinguishes its role as a policy-making body from the delegation authorized to the superintendent for the administration of the district.					

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## GSBA Board/Leadership Team Self-Assessment Checklist

### IV. Board Operations: Policy Development

Sat	NI	DK	Board Indicators	Sat	NI	DK	Superintendent Indicators
			A. The board has current policies that meet all requirements of state board rule and law.				A. The superintendent maintains and distributes the adopted policies.
			B-1. The board has adopted policies or procedures for all policy development, revisions and adoption.				B. The superintendent follows the board-adopted policies or procedures when presenting new or revised policies to the board for consideration.
			B-2. The board has adopted policies or procedures for emergency adoption of policy.				
			B-3. The board has adopted policies or procedures for policy dissemination.				
			B-4. The board has adopted policies or procedures for policy repeal.				
			C-1. The board requests the superintendent's recommendations on all proposed policies.				C-1. The superintendent provides recommendations, usually in writing, on all policies presented to the board.
			C-2. Opportunities for public review on proposed policies are given before final board action.				C-2. Superintendent will seek out staff and public opinions on proposed policies and report the findings to the board.
			C-3. Procedures are in place for policy to be reviewed periodically.				C-3. The superintendent interprets and executes board policies.

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## GSBA Board/Leadership Team Self-Assessment Checklist

### V. Board Operations: Board Meeting

Sat	NI	DK	Board Indicators		Sat	NI	DK	Superintendent Indicators
			A. The Board of Education meeting agenda is properly developed, posted for public review, and conducted in accordance with the Open Meetings Law (50-14-1)					A. The superintendent will post all meetings of the board conducted in accordance with the Open Meetings Law (50-14-1)
			B. The board procedures allow an opportunity, prior to board meetings, for members to suggest items be removed from or placed on the agenda, as well as to request additional information concerning an item.					B. The superintendent follows procedures on planning and conducting board meetings that include type of meetings, agenda development, and recommendations to the board.
			C. The agenda provides a sound order of business, including an opportunity to make adjustments to the agenda that facilitates productive meetings.					C. The superintendent provides written reports on action plans, status of adopted district goals achievement, information on agenda items where needed and written recommendation(s) on action items.
			D. The board uses a “consent agenda” procedure when appropriate.					
			E. The board only departs from the approved agenda under special circumstances and with concurrence of a majority of its members.					
			F. The board has procedures in place to facilitate public input.					F. The superintendent provides the board with input learned from the public.

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		G. Board minutes properly record actions of the board and the minutes are maintained as prescribed by the Open Records Act.				G. The superintendent maintains the official board records and other records that pertain to the Open Records Act.
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## GSBA Board/Leadership Team Self-Assessment Checklist

### VI. Board Operations: Personnel

Sat	NI	DK	Board Indicators		Sat	NI	DK	Superintendent Indicators
			A-1. The board oversees the management of the district by employing a superintendent and evaluating his/her performance.					
			A-2. The board and individual board members support the superintendent as chief executive officer and his/her role as general supervisor of all school system/district employees.					A. Providing leadership as chief executive officer, the superintendent acts as general supervisor of all school system/district employees.
			B. The board authorizes the employment, assignment, and dismissal of personnel only on the recommendation of the Superintendent.					B. The superintendent recommends all personnel actions taken by the board including the employment, assignment and dismissal of personnel to the board.
			C. The board reviews the evaluation processes utilized by the superintendent to evaluate all personnel in the district.					C. The superintendent plans and implements a personnel evaluation system that identifies the strengths and weaknesses of employees in the district.
			D. The board has in place a job description for the superintendent and additional staff as required by law.					D. The superintendent reviews, recommends and maintains job descriptions for staff as required by law.
			E. The board has been trained in the superintendent formal evaluation process.					

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			F. Periodically, but at least once in any 12 month period, the board, using an approved instrument and processes agreed upon by the board and the superintendent, evaluates the professional performance of the superintendent.					F. Periodically, but at least once in any 12 month period, the superintendent is evaluated on his/her professional performance, using an approved instrument and processes agreed upon by the board and the superintendent.
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## GSBA Board/Leadership Team Self-Assessment Checklist

### VII. Board Operations: Financial Management

Sat	NI	DK	Board Indicators		Sat	NI	DK	Superintendent Indicators
			A. The board provides guidance to the superintendent in developing the tentative budget.					A. The superintendent coordinates with the board in developing the tentative budget.
			B. The board complies with the budget development process and time lines to meet state and local requirements.					B. The superintendent develops the proposed tentative budget the budget development process and time lines to meet state and local requirements.
			C. The board publishes the budget and provides opportunity for public review and action.					
			D. Once the budget is approved that incorporates sound business and fiscal practices, the board allows the superintendent to implement and administer the budget.					D. Once the budget is approved that incorporates sound business and fiscal practices, the superintendent implements and administers the budget.
			E. The board establishes the level of spending beyond the approved budget which the superintendent must seek Board approval.					E. The superintendent administers the approved budget within board established spending levels and recommends budget amendments when necessary.
			F. The board receives monthly financial reports on the status of the budget.					F. The superintendent prepares monthly financial reports on the status of the budget.
			G. The board's financial records are audited annually.					G. The superintendent maintains the district's financial records and cooperates with auditors annually to audit financial records.

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## GSBA Board/Leadership Team Self-Assessment Checklist

### VIII. Board/Staff/Community/Relations

Sat	NI	DK	Board Indicators	Sat	NI	DK	Superintendent Indicators
			A. The board and individual board members demonstrate respect and cooperation in their relationships with each other and with the superintendent, staff and community.				A. The superintendent demonstrates respect and cooperation in professional relationships with the board and individual board members, staff and community.
			B. The board recognizes and protects the chain of command.				B. The superintendent recognizes and protects the chain of command.
			C. The board works with the superintendent to provide a process – and follows that process – that encourages and seeks the input of staff at all levels in decision-making on significant issues where it is appropriate.				C. The superintendent works with the board to provide a process – and follows that process – that encourages and seeks the input of staff at all levels in decision-making on significant issues where it is appropriate.
			D. The board working with the superintendent seeks and receives input from citizens on matters relating to the school district and communicates with the community.				D. The superintendent working with the board seeks and receives input from citizens on matters relating to the school district and communicates with the community.
			E-1. The board provides the resources for training to school councils.				E-1. The superintendent assists the board in providing resources for training to school councils.
			E-2. The board has collaboration agreements with local and state agencies.				E-2. The superintendent implements agreements with local and state agencies.
			E-3. The board communicates with the community using forums, groups, the media and/or other vehicles.				E-3. The superintendent acts as a liaison for the board and community using forums, groups, the media and/or other vehicles.

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			E-4. Supports the school administration before critical groups in the community and reserves evaluation of the superintendent for executive session.					E-4. Studies community concerns, complaints and reports to the board if action is necessary.
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Board Comments	Next Yr. Priority	Superintendent Comments	Next Yr. Priority



## Board Action Plan to Implement GSBA Board/Leadership Team Self-Assessment Checklist

Board Goals to be addressed: (what) \_\_\_\_\_  
\_\_\_\_\_.

Action Steps (how)	Accountability (who)	Completed (when)
1.		
2.		
3.		
4.		
5.		

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**Evidence of completion:**

1.
2.
3.
4.
5.



## Superintendent Action Plan to Implement GSBA Board/Leadership Team Self-Assessment Checklist

Superintendent Goals to be addressed: (what) \_\_\_\_\_  
\_\_\_\_\_.

Action Steps (how)	Accountability (who)	Completed (when)
1.		
2.		
3.		
4.		
5.		

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**Evidence of completion:**

1.
2.
3.
4.