School Board Self-Evaluation:
A Practical Model for Improving Board Performance

NMSBA Board Institute
(Boardmanship Strand)
Santa Fe, New Mexico
February 25, 2017

In This Session You Will:
- Examine the rationale for Board self-evaluation
- Explore some of what’s out there
- Review a model employing best practices
- Interact with APS Board President, Dr. David Peercy, who has experienced the process
- Get any questions you have answered
- Learn how your Board can further explore self-evaluation

Why Self-evaluate?
- Holds Board members accountable to themselves, the Board, staff and community
- Exercises your power as a Board to model positively for the district
- Improves decision making by enhancing a common understanding of philosophies and goals.
- Provides a starting point for effective goal setting and long range planning
What's Out There?

- Several hundred hits on Google "School Board Self-Evaluation"
- Range from exceptional to marginal
- Four samples available via email if you want to explore further and develop your own. Sign-up sheet is circulating.
- No single "best way."

What Represents Best Practices?

- Some form of policy driving the process
- Reflectively developed set of criteria against which performance is assessed
- Some mechanism in the process to gather Board member communications and problem-solving preferences and share those
- Set of thoughtfully developed goals as an outcome against which the Board will hold itself accountable

Board Self-Evaluation Model Based on Best Practices

- Well Developed Board Self-Evaluation Policy
- Communications and Problem-solving Assessment (MBTI)
NMSBA Policy

Communications and Problem-solving Assessment--Myers-Briggs (MBTI)

- Communications and Problem-solving Preference Indicator
- Self-Report
- Non-judgmental
- Well researched
- Used for growth

What's Our Type?

<table>
<thead>
<tr>
<th>Board Member</th>
<th>MBTI Type</th>
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<tbody>
<tr>
<td>Board Member 1</td>
<td>INFJ</td>
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<td>Board Member 2</td>
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<td>Superintendent</td>
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Criteria for Assessment

1. Working Strategically-Goal Setting and Planning
2. Board/Superintendent Relations
3. Board Meetings
4. Financial Oversight
5. Policy and Governance
6. Board Interpersonal Qualities
7. Board Relations with Staff
8. Board Relations with Community
9. Board Development
10. What are the three greatest strengths of the Board?

Feedback on Criteria

1. Working Strategically-Goal Setting and Planning: The Board could improve their strategic planning by being more deliberate in setting clear and measurable goals for the district, which are focused on student success.

APS Board Evaluation Categories In Descending Order of Mean Response

<table>
<thead>
<tr>
<th>Category</th>
<th>Mean Response</th>
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<tbody>
<tr>
<td>Board Development</td>
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<tr>
<td>Policy and Governance</td>
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<td>Financial Oversight</td>
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<td>Board/Superintendent Relations</td>
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<td>Working Strategically-Goal Setting and Planning</td>
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<td>Board Meetings</td>
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<td>Board Interpersonal Qualities</td>
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Thoughtfully Developed Board Goals

Albuquerque Public Schools
Board of Education Self-Evaluation Retreat May 10, 2014
Discussion Draft: Board Goals for Board Growth and Improvement
Revised July 31 Based on Board Member's Perspectives

Goals

Original Draft Goal 1
Goal 1: Continue to build a stronger and more effective relationship with the superintendent by providing the quarterly formative feedback in written form as a component of the evaluation process.

Revised Goal 1 and Rationale
Goal 1: Continue to build a stronger and more effective supervisory relationship with the superintendent. Staying in touch via phone calls and meeting face to face helps to keep the lines of communication open and to share information about the implementation process and providing the Board with a clear understanding of the implementation process overall.

Support: The facilitator presents the results of the the implementation evaluation process as one of the major steps in the long-term. The facilitator identifies the remaining steps in the implementation process whereby the Board provides the superintendent with constructive feedback, opportunities for improvement, and makes decisions on a Board about the terms and conditions of the superintendent’s employment. No, no need to make notes on the Superintendent’s review, the process, receiving the feedback, and the supporting board review.

NMSBA Self-Evaluation Support for Boards (SES)

The NMSBA Self-Evaluation Support (SES) Training Module:
- How the board can create a functional policy to distinguish the process of self-evaluation.
- How the board identifies the key elements on which they want to receive feedback.
- How the board determines the most effective feedback mechanisms to generate the feedback.
- How the board can process the feedback in a constructive manner.
- How the board can identify and prioritize key goals for the board and parents based on the feedback.
- How the board can create a SMART (specific, measurable, achievable, realistic, and time-based) plan to implement these goals.
- How the board monitors the SMART plan so that the plan actually forms the basis for meaningful changes in the process of the board.

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