



SCHOOL BOARD SELF-ASSESSMENT

Board Member Name: _____

Date: _____

School Board Name: _____

Chair Name: _____

Principal Name: _____

Submit completed form to Secretary of Board at least seven (7) days prior to Annual Planning Meeting

MISSION AND PURPOSE

Fundamental to the school's performance is a clear, strong mission and purpose. A successful Board must know what it does, who it serves and why.

MISSION AND PURPOSE	Excellent	Good	Poor	N/A
The statements of mission and purpose are well understood and supported by the Board				
The Board consistently relates its decisions to the mission				
The Board is active in insuring that the school's mission is promoted in the school and on the Board				
The Board reviews the By-Laws on a regular basis and revises when necessary				
The Board in collaboration with the school community annually reviews the Mission Statement and revises it when necessary				

Comments:

STRATEGIC PLANNING

Planning for the school's future is critical for its success. Such planning should be reviewed and approved by the Board.

STRATEGIC PLANNING	Excellent	Good	Poor	N/A
Performance of Board in initiating strategic planning				
The Board's participation in strategic planning				
The Board accomplishes the activities for which it has responsibility in the strategic plan				
The Board reviews and/or revises its Strategic Plan on a regular basis (annually)				

Comments:

ADVANCEMENT/MARKETING

(Public Relations and Marketing, Fund Development, Alumni and Constituency Relations, and Enrollment Management)

The board should insure that the school has the resources needed to be effective. The role of the Board should include the attraction of funds and friends to the school. It should help build confidence in the school for the long term. The Board should promote public awareness of the school and create good will within the community.

ADVANCEMENT	Excellent	Good	Poor	N/A
Board leadership in adopting and implementing a five-year advancement plan (i.e. endowment, capital campaigns, annual fund, constituency relations)				
Board leadership in adopting and implementing a five-year public relations plan				
Board leadership in adopting and implementing a five-year marketing plan, including enrollment management				
Regular monitoring and updating of plans				

Comments:

FINANCIAL MANAGEMENT

The Board should assist in effective management of the school. This may include formulating and adopting policies, overseeing investments, and participating in the budget process and financial plan section of the Strategic Plan of the school.

FINANCIAL MANAGEMENT	Excellent	Good	Poor	N/A
The Board reviews and approves the budget prepared by the Finance Committee				
The Board receives and systematically reviews financial reports (i.e. monthly) on a regular basis				
The Board is consulted in all financial matters concerning the school				
The Board composition includes members who bring special expertise to financial matters				

Comments:

THE BOARD AGENDA

BOARD AGENDA	Excellent	Good	Poor	N/A
The Board agenda is prepared collaboratively by the President/Principal (and Pastor for Parish School Boards) and Board Chair				
The agenda and committee reports are distributed at least one week in advance of meetings				
The agenda and committee report are accompanied by appropriate background data				
The orientation of new board members and the continued updating of all board members are offered				

Comments:

PASTOR, PRINCIPAL/HEAD OF SCHOOL/PRESIDENT AND THE BOARD

The Pastor, Principal/Head of School/President, and the Board must maintain an effective working relationship. The relationship between the Pastor, the Principal/Head of School/President, and the Board Chair is particularly important.

PASTOR, PRINCIPAL/CHIEF ADMINISTRATOR AND THE BOARD	Excellent	Good	Poor	N/A
The Parish School Board understands its role as a consultative body to the Pastor and the Principal				
The Archdiocesan High School Board understands its role as consultative to the Head of School/President and Vicar and Superintendent				
The Board Chair effectively presides over meetings				
Communication between the Administration and Chair is evident				
The Board is faithful to the agenda, moving through items in a deliberate and orderly fashion				
The Board carefully examines all issues and items brought to its attention				
The Board fosters openness and objectivity during meetings and encourages expression of competing points of view				
The Board makes effective use of the time, talent and other resources available to it				
The Board has enough time to complete its work				
The Board monitors its decisions to evaluate their effectiveness				
The Board participates in the performance appraisal of the President and/or School Principal as directed by the Office of Education, Evangelization and Catechesis				
The Board evaluates its own performance on an annual basis using an Archdiocesan approved instrument				
The Board is publicly supportive of the school and its administration				
The Board works as a team to advance the mission of the school				

Comments:

COMMITTEES: Strategic Planning, Advancement/Marketing, Finances, Nominating, etc.

COMMITTEES	Excellent	Good	Poor	N/A
Committee meetings are frequent enough				
Committee addresses issues of substance				
Committee reports are submitted to Chair prior to distribution of Board agenda				
The committees have clearly defined tasks				
The committees report regularly about their progress on assigned tasks				
Committees are viewed as the “backbone” of the Board				
Committees of the Board think strategically to accomplish their task which is to ensure the long term viability of the school				

Comments:

EVALUATION OF INDIVIDUAL BOARD MEMBER

It is suggested that each member respond to this section only after having completed all other parts of the Evaluation. Please rate your own performance.

SELF EVALUATION	Excellent	Good	Poor	N/A
Your familiarity with the school’s mission, organization, plans, priorities, finances, and character				
Attendance at Board meetings				
Familiarity with agenda items and key issues in advance of meetings				
Active participation in Board meetings				
Active work on regular Board committees (attendance at meetings, participation in discussions)				
Regularly read the school’s newsletters, bulletins, announcements and otherwise stay abreast of developments of the school				
Maintain a good working relationship with the Administration				
How would you rate your own, overall contribution as a Board member				
How would you rate your own, overall personal satisfaction as a Board member				
Active participation in school activities				
Maintain confidentiality of all Board business				
Awareness of and adherence to Board conflict of interest policy				

Comments:

Other comments about the functioning of the School Board and recommendations:

(SWOT – Strengths, Weaknesses, Opportunities, Threats)

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(Adapted by the Office of Education, Evangelization and Catechesis January 2010, Original Source Unknown)