



Draft Monitoring Calendar Development Tool

Step 1 - Confirm foundational conditions

Before constructing a monitoring calendar, confirm:

- ☐ Board-adopted goals exist
- ☐ Board-adopted guardrails exist
- ☐ Interim goals and interim guardrails are defined
- ☐ Interim metrics are updateable multiple times per year
- ☐ Data sources and anticipated release windows are known

Step 2 - Establish calendar scope

Rule - Calendar must span full goal term

If goals are 3 to 5 years → calendar spans same duration.

- ☐ Yes

Rule - Calendar must include all goals and guardrails

Every adopted priority appears on the calendar.

- ☐ All goals included
- ☐ All guardrails included

Step 3 - Determine monitoring frequency

Rule - Goal monitoring minimum frequency (composition rule)

Each goal must be monitored at least four times per year.

Operational meaning:

If a goal has three interim goals:

- Monitoring Interim Goal 1 = 1 monitoring instance
- Monitoring Interim Goal 2 = 1 monitoring instance
- Monitoring Interim Goal 3 = 1 monitoring instance
- Monitoring Overall Goal = 1 monitoring instance

Total = 4 monitoring instances

This rule ensures that monitoring captures both:

- progress signals (interim goals)
- outcome trajectory (overall goal)

- ☐ Does each goal appear at least four times per year through a combination of interim goal monitoring and overall goal monitoring?

Rule - Guardrail monitoring minimum frequency

Each guardrail is monitored at least once annually.

Design intent

Because the board's primary monitoring responsibility is progress toward student outcome goals, monitoring calendars are designed to prioritize goal monitoring as the central focus. Annual guardrail monitoring ensures continued attention to value alignment while preserving sufficient board meeting time for high-quality goal monitoring.

Boards may elect to monitor guardrails more frequently based on local context or emerging concerns. However, increased guardrail monitoring should not occur at the expense of goal monitoring cadence or depth.

- ☐ Does each guardrail appear at least once per year?
- ☐ If more frequent, does this preserve goal monitoring priority?

Step 4 - Determine monitoring load per meeting

Rule - Monthly monitoring load (capacity rule)

Monitoring calendars should typically schedule:

- 1–2 goals per meeting
- No fewer than 1 goal
- No more than 2 goals
- Absolute maximum of 3 (rare exception)

This supports:

- depth of monitoring conversation
- feasible superintendent preparation
- meaningful board engagement

- ☐ Does each meeting include 1–2 goals (≤3 exception)?

Step 5 - Align monitoring to data readiness

Rule - Monitoring follows data readiness AND sense-making (readiness rule)

Monitoring should occur when:

- data has been released
- data has been validated
- leadership has interpreted the data
- root cause hypotheses are emerging
- strategic responses can be articulated

Monitoring immediately after release without sense-making risks:

- descriptive reporting
- limited interpretation
- weak monitoring conversation

As you review the draft calendar:

- ☐ Does placement consider when each data source is released?
- ☐ Does placement consider the amount of time needed for validation?

- ☐ Does placement consider the amount of time needed for interpretation?
- ☐ Does monitoring timing reflect sense-making readiness?

Note: *Monitoring should typically occur within approximately 30–60 days after data collection to allow sufficient time for validation and sense-making while preserving timely board receipt and discussion.*

Step 6 - Ensure calendar balance

Rule - Distribute monitoring across year

Avoid clustering monitoring late or early:

- ☐ Monitoring evenly distributed
- ☐ Every meeting includes monitoring
- ☐ Long gaps avoided

Step 7 - Integrate governance cycle events

Calendar may include:

- board self-evaluation
- superintendent evaluation
- board training
- community listening
- statutory votes

- ☐ Events integrated and distinguished from monitoring

Note: *staff may not have access to all the information needed to integrate some of these items.*

Step 8 - Confirm governance ownership

Rule - Calendar is board-owned

Staff draft; board adopts.

- ☐ Board adoption anticipated

Step 9 - Apply feasibility check

Final staff reflection:

- ☐ Monitoring reports can realistically be prepared
- ☐ Calendar does not create artificial reporting burden
- ☐ Monitoring reflects data management already uses

Step 10 - Pre-board submission checklist

- ☐ All rules satisfied
- ☐ Visual calendar created
- ☐ Rationale prepared
- ☐ Assumptions documented
- ☐ Decision points identified