Assessment of District Goals

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SOP Number	SOP-SSO-1002
Responsible Office	Office of Strategy and Operations
Administering Office	Strategic Initiatives and Performance Management Department
Coordinating Offices	School Board; Superintendent; School Board Members' Office and designated agenda-support personnel; Human Resources; Finance; District division and department leaders; School Administration; program-evaluation and data personnel
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Review Cycle	At least every two years and whenever Policy 1002 or related brand standards change
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1. Purpose

Establish an annual process for assembling reliable evidence, assessing progress toward District goals, diagnosing results, and preparing revisions and follow-up actions under Policy 1002. The process supports the Board's assessment with the administration, its evaluation of the Superintendent, and its own performance review and improvement plan.

2. Authority and Related Materials

- School Board Policy 1002, Assessment of District Goals, adopted September 15, 2026
- Authorities cited in Policy 1002: F.S. 1001.41
- The Chief Strategy and Operations Officer serves as the Superintendent's designee for coordinating administrative implementation through the Strategic Initiatives and Performance Management Department. The Board retains its role in establishing goals and allocating resources, providing the annual assessment time, evaluating the Superintendent, assessing the Board as a whole and each member,

and developing and implementing its own performance-improvement plan. The Superintendent remains the subject of the Board's evaluation and a participant in the annual assessment; that role is not transferred to a chief.

3. Scope

Applies to District and school personnel responsible for goal implementation, performance data, staff or program evaluations, resource information, annual assessment preparation, and follow-up. Supports the Board's work as a governing body without creating a separate personnel-evaluation instrument or changing existing evaluation authority.

4. Definitions

Term	Definition
District goals	Current goals established by the Board with the administration to accomplish the District's mission.
Annual progress assessment	The Board and administration's review of the previous year's progress toward current District goals, conducted in conjunction with the annual Superintendent evaluation.
Goal owner	The division, department, or school leader assigned administrative responsibility for implementing or reporting on a goal or related strategy.
Assessment criterion	An established measure, target, or other approved basis used to compare results with the intended outcome of a goal or strategy.
Reliable results-to-date data	Evidence with an identified source, reporting period, method, and sufficient quality to support assessment of goal progress. Limitations are disclosed rather than treated as confirmed results.
Synthesized evaluation information	Summaries drawn from Superintendent evaluation, Board self-assessment, and program and staff evaluation information to help explain progress or lack of progress.
Remedial action	A proposed action to reduce or eliminate a significant cause of unsatisfactory progress that the District can address.
Reinforcement action	A proposed action to sustain a significant factor contributing to satisfactory progress that the District can influence.
Board performance-improvement plan	The plan the Board develops and implements to improve its own performance as the body governing the District.

Term	Definition
Goal-results data	Quantitative or qualitative evidence supplied by the responsible source office to demonstrate progress toward an established District goal, strategy, action, measure, or target.
Evidence-readiness record	The administrative record identifying available evidence, source-office validation, known limitations, missing information, and readiness for the annual assessment.

5. Roles and Responsibilities

Role	Responsibility
School Board	Works with the administration to establish District goals and allocates necessary resources. Provides time for the annual goal assessment with the administration in conjunction with its Superintendent evaluation. Assesses the Board as a whole and each member, reviews goal progress and proposed priorities and revisions, and develops and implements its own improvement plan. Retains governing decisions and approvals.
Superintendent	Participates with the Board in the annual goal assessment and in the Board's annual Superintendent-evaluation process; provides relevant administrative information and presents or supports recommendations to the Board. Administrative coordination may be performed through the Chief Strategy and Operations Officer as designee.
Chief Strategy and Operations Officer	Oversees administrative implementation as the Superintendent's designee; reviews the proposed assessment schedule, evidence readiness, analysis, and recommendations; coordinates presentation with the Superintendent; and ensures matters requiring Board review or decision reach the Board.
Strategic Initiatives and Performance Management Department	Administers the SOP; coordinates the annual calendar, documentation of confirmed goal-owner assignments, evidence collection, submission review and source-office validation, comparative analysis, synthesized materials, Board submission, decision records, and follow-up tracking. Discloses missing evidence and monitors completion of policy requirements.
District division and department leaders and principals	Document goal-related actions, results, barriers, and resource use within their responsibility; validate submissions; explain results; develop

Role	Responsibility
	proposed remedial and reinforcement actions; and implement authorized revisions and report follow-up.
Program-evaluation and data personnel	Provide completed learning-program evaluations and goal-results data; verify sources and calculations; document comparability and limitations; and correct discrepancies referred by the administering department.
Human Resources and authorized evaluation custodians	Provide completion status and appropriately authorized summaries of key administrator and staff evaluations relevant to goals; coordinate permitted access to evaluation information and protect restricted records.
Finance	Provides relevant resource and financial information, reviews resource implications of proposed actions, and supports routing of changes requiring Board allocation or approval.

6. Standards

- The Board works with the administration to establish goals for accomplishing the District's mission and allocates resources necessary for their accomplishment.
- In conjunction with the annual evaluation of the Superintendent, the Board provides time for the Board and administration to assess the previous year's progress toward current District goals.
- The Superintendent evaluation and goal assessment occur when adequate and reliable results-to-date data for each goal are available and learning-program evaluations and evaluations of key administrators and other staff have been completed for reference.
- The Board uses the assessment and evaluation period to assess its effectiveness as a whole and the effectiveness of each Board member.
- Summaries and synthesized information from the Superintendent evaluation, Board self-assessment, and program and staff evaluations are available to help determine reasons for progress or lack of progress toward District goals.
- The annual assessment and evaluation process is not finished until goals, strategies, and actions have been reviewed and reprioritized; revisions reflect what the year's evaluation evidence indicates should change or continue; and the Board develops and implements a plan to improve its own governing performance.

7. Procedure

7.A. Coordinate the annual assessment schedule

7.A.1 The Strategic Initiatives and Performance Management Department obtains the annual Superintendent-evaluation schedule and relevant program and staff evaluation completion schedules from the Superintendent's office, Board-support personnel, Human Resources, and program-evaluation personnel. It identifies when adequate and reliable results-to-date data for each goal will be available.

7.A.2 The department prepares a proposed assessment calendar identifying evidence deadlines, administrative analysis and review, the annual Board assessment period, and follow-up activities. The Chief Strategy and Operations Officer reviews readiness with the Superintendent and routes the proposal through the established Board scheduling process for the Board to provide the assessment time in conjunction with the Superintendent evaluation.

7.A.3 Board-support personnel communicate the scheduled Board assessment period. The department distributes the corresponding administrative deadlines to goal owners. If data availability or evaluation completion changes, the department discloses the effect to the Chief and Superintendent and requests scheduling direction through the same Board process; staff do not treat an incomplete readiness review as completion of the annual assessment.

7.B. Confirm goals criteria and participant responsibilities

7.B.1 The administering department compiles the current Board-established goals, strategies, actions, and existing assessment criteria. It records the applicable reporting period, administrative goal owner, contributing offices, data source, intended result, and resource information needed. Unresolved measures or proposed changes are identified for review rather than presented as already approved.

7.B.2 Goal owners review their assigned responsibilities and document what has been done to date. The department checks the roles of central office leaders, principals, and relevant employees and obtains applicable evaluation criteria and completion schedules from authorized custodians to identify their relationship to goal implementation.

7.B.3 The Chief Strategy and Operations Officer coordinates clarification of administrative assignments with the Superintendent. Any proposed change to Board-established goals, priorities, or governing criteria is routed for Board consideration through the established agenda process. The department retains the confirmed goal and responsibility record as the basis for collection and comparison.

7.C. Collect and validate results and evaluation information

7.C.1 The department requests goal-results data and implementation records from goal owners, completed learning-program evaluations from program-evaluation personnel, relevant authorized staff-evaluation summaries from Human Resources or custodians, and

resource information from Finance. Each request specifies the goal, reporting period, source details, and submission deadline in the assessment calendar.

7.C.2 Contributing offices verify their submissions for completeness, accuracy, relevance, and clarity and identify missing information or limitations. Program and data personnel validate calculations and comparability. The department reconciles conflicting submissions with the source office, records corrections, and identifies unresolved gaps in the evidence-readiness record.

7.C.3 The department organizes verified evidence by goal and criterion so results can be compared with the intended outcomes. It provides the Chief and Superintendent a readiness summary confirming available results and completed program and staff evaluations and disclosing any remaining limitations. Access to personnel-evaluation information follows the existing authorized evaluation and records processes. The department does not obtain or retain underlying personnel-evaluation records and uses only summaries authorized by the applicable records custodian.

7.D. Compare results and diagnose contributing causes

7.D.1 The department and goal owners compare verified evidence with each established criterion individually, then prepare a supported assessment of overall progress for each goal. They use existing approved descriptors where available and explain the basis for conclusions; the Neola example's Excellent, Good, Fair, and Poor labels are not automatically adopted.

7.D.2 Goal owners identify satisfactory and unsatisfactory factors and rank them by significance. They explain likely reasons using implementation records, completed program and authorized staff evaluation information, resource data, and other relevant evidence. The department distinguishes supported findings from tentative explanations and records limitations.

7.D.3 The department and goal owners identify which actions, conditions, or influences the District can address and which lie beyond its control. The Chief reviews the comparison and diagnosis for presentation with the Superintendent to the Board, preserving the Board's own assessment of progress.

7.E. Support Board and Superintendent evaluation and synthesize findings

7.E.1 Human Resources coordinates the Board's annual Superintendent evaluation under its existing evaluation process and the Board's assessment of itself as a whole and each member. The Board determines its self-assessment approach through its established process; the administering department provides relevant goal-progress materials and technical support requested by the Board.

7.E.2 Following the availability of the Superintendent evaluation and Board self-assessment information, authorized custodians provide the permitted summaries to the administering department. Human Resources synthesizes these with program and staff evaluation information, showing how the evidence helps explain progress or lack of progress toward goals and disclosing restrictions or gaps.

7.E.3 Human Resources coordinates the synthesis with the Superintendent and routes it to the Board through the established materials process. If evaluation or self-assessment information becomes available during the annual assessment period, the department supplies a supplemental synthesis for Board review before the annual process is treated as complete. Staff do not independently evaluate Board members or replace the Board's Superintendent evaluation.

7.F. Present the annual assessment to the Board

7.F.1 The department assembles the assessment packet with current goals, verified results-to-date, comparative analysis, program and staff evaluation summaries, available Superintendent and Board assessment synthesis, significant causes, evidence limitations, and proposed follow-up. The Chief reviews the packet with the Superintendent for presentation to the Board.

7.F.2 The department submits the packet and agenda materials through the designated Board agenda-support process by applicable existing deadlines. Board-support personnel distribute the materials and coordinate the assessment session scheduled by the Board. The department retains evidence of submission and identifies any supplemental information needed.

7.F.3 The Board and administration assess the previous year's progress toward current goals during the annual assessment period. Staff present the evidence and respond to Board questions. The department documents requested analysis, revisions, and follow-up from the official meeting record and coordinates responses with the responsible offices; administrative presentation does not constitute the Board's assessment or approval.

7.G. Review priorities and prepare revisions and action plans

7.G.1 Using the annual evidence and Board assessment, goal owners prepare proposed revisions to goals, strategies, and actions. For significant negative factors the District can influence, they propose remedial actions; for positive factors, they propose reinforcement actions. Each proposal identifies the reason, action owner, intended result, resource implications, and a proposed follow-up schedule.

7.G.2 The department consolidates proposals and works with Finance on resource implications. The Chief and Superintendent review recommendations and submit matters involving Board-established goals, priorities, or resource allocations to the Board through the established agenda process. The submission identifies what should change, what should continue, and why the evaluation evidence supports each recommendation.

7.G.3 The Board reviews goals and proposed priorities and revisions with the administration and takes required governing action. The department records the review, reprioritization, and resulting authorized changes from the official record, obtains clarification of unresolved direction through the established Board process, and distributes implementation instructions to goal owners. Staff implement administrative actions only within existing delegated authority.

7.H. Support the Board performance improvement plan

7.H.1 Based on its self-assessment and the annual assessment evidence, the Board develops its own plan to improve performance as the governing body. Board-support personnel provide the Board-selected planning materials and coordinate any requested administrative information. The plan records Board-selected actions and how implementation will be reviewed.

7.H.2 Board-support personnel retain or route the official record of the Board's plan and communicate Board-directed administrative support to the Chief and administering department. The Board implements its governing-performance actions; staff perform only the support assigned to them and report completion through the designated Board process.

7.H.3 Board-support personnel coordinate the Board's review of plan implementation as directed by the Board. The department tracks evidence that the plan has been developed and implementation has occurred for the annual completion review. Administrative staff may recommend support, but do not approve, substitute, or declare the Board's own improvement plan implemented without supporting Board records.

7.I. Verify annual completion and monitor follow through

7.I.1 The administering department checks the official assessment and decision records to confirm that goals, strategies, and actions have been reviewed and reprioritized; evidence-based changes and continuations have been made; and the Board has developed and implemented its performance-improvement plan. It sends any incomplete requirement to the Chief and Superintendent for follow-up with the Board through the established process. The department records any incomplete required element and carries it forward for follow-up through the established Board process. Staff do not independently determine whether the Board's performance-improvement plan has been fully implemented.

7.I.2 Goal owners implement authorized actions and report results, barriers, and needed adjustments according to the approved follow-up schedule. The department periodically compares updated evidence with the applicable criteria, verifies completion with the source offices, and prepares progress information for the Chief and Superintendent.

7.I.3 Proposed changes requiring Board review or decision return through the established Board agenda process. Administrative changes within delegated authority are documented and communicated to affected offices. The department carries verified results, remaining barriers, and action status into the next annual cycle and records the evidence supporting annual completion.

8. Records

The administering department maintains the assessment calendar, goal and responsibility register, source-data submissions, validation and correction records, authorized evaluation summaries, comparisons, causal analysis, synthesis, Board packets and submission evidence, proposed and authorized action plans, follow-up records, and annual completion

checklist. Board-support personnel maintain or route the official Board decisions, self-assessment records, and Board improvement plan and implementation records. Evaluation custodians retain underlying personnel records under their applicable processes. Maintain records under District retention and access requirements; this SOP establishes no new retention period or disclosure authority.

9. Training and Monitoring

- The Strategic Initiatives and Performance Management Department provides participating offices guidance on the annual calendar, goal responsibilities, evidence submissions, validation, analysis, Board routing, and completion requirements.
- Human Resources and authorized custodians provide guidance on permitted use and access to evaluation information; Finance supports resource-impact reporting.
- The Chief Strategy and Operations Officer monitors evidence readiness, submission gaps, and follow-through with the Superintendent. Items requiring Board direction are submitted through the established Board process.
- The administering department monitors goal-owner action status and annual completion evidence and reports missing requirements for correction. Periodic monitoring supports the annual assessment and does not replace it.
- Board-support personnel coordinate information and support requested by the Board for its self-assessment and performance-improvement plan, preserving the Board's control over those activities.

10. Recommendations: Business Practice Bulletins (BPB) Development

- **Coordinate the annual assessment schedule (Section 7.A):** The Strategic Initiatives and Performance Management Department should develop an annual-calendar BPB identifying how it obtains Superintendent, program, and staff evaluation schedules and confirms goal-data availability. Provide an evidence-readiness checklist, proposed calendar, and routing through the Chief and Superintendent to the established Board scheduling process. Identify how the Board's assessment time and any changes are communicated and tracked, without creating a fixed annual date unsupported by Policy 1002.
- **Confirm goals criteria and participant responsibilities (Section 7.B):** The administering department should develop a goal-and-responsibility BPB with a register of current goals, strategies, criteria, reporting periods, goal owners, contributing offices, and evidence sources. Include a role-review worksheet and a method for documenting alignment with relevant evaluation criteria. Identify administrative clarification and Board routing for proposed changes; do not import unselected Neola plan formats or unsupported rating scales.
- **Collect and validate results and evaluation information (Section 7.C):** The administering department should develop an evidence-collection BPB with submission instructions, required source and period fields, office validation, correction routing, and readiness documentation. Provide a register linking each goal to results, completed

program evaluations, authorized staff summaries, and resource evidence. Identify permitted access and a method for labeling missing or noncomparable data before Board assessment.

- **Compare results and diagnose contributing causes (Section 7.D):** The administering department should develop an analysis BPB providing a criterion-by-criterion comparison template, supported progress conclusions, and a method for ranking satisfactory and unsatisfactory factors. Include evidence references, distinction between findings and tentative causes, and a controllable-factor review. Identify Chief and Superintendent review before submission to the Board and use only approved assessment descriptors.
- **Support Board and Superintendent evaluation and synthesize findings (Section 7.E):** The administering department, with Board-support personnel and authorized evaluation custodians, should develop a BPB defining the handoff of goal materials into the Board's evaluation and self-assessment processes. Identify who obtains permitted summaries, how the synthesis links findings to goal progress, and how supplemental information reaches the Board before completion. Preserve Board control of its self-assessment approach and existing Superintendent-evaluation authority.
- **Present the annual assessment to the Board (Section 7.F):** The administering department should develop a Board-assessment BPB identifying packet contents, Chief and Superintendent review, agenda submission, distribution, and supplemental-material handling. Provide a presentation outline and a register of Board questions and follow-up with assigned offices and completion records. Identify the official meeting record as the source for Board actions and distinguish an informational presentation from an item requiring Board decision.
- **Review priorities and prepare revisions and action plans (Section 7.G):** The administering department should develop an action-planning BPB with remedial and reinforcement templates documenting evidence, cause significance, proposed changes or continuations, action owners, intended outcomes, resource implications, and follow-up. Identify Finance review and Chief and Superintendent routing for Board consideration of goals, priorities, and resource allocations. Include a decision-to-implementation record so staff can distinguish proposals from authorized revisions.
- **Support the Board performance improvement plan (Section 7.H):** Board-support personnel, with the administering department, should develop a BPB for supporting the Board's own improvement plan. Identify Board-selected planning materials, official recording of the plan, assignment of administrative support, and reporting of implementation back to the Board. Provide an implementation tracker that separates Board actions from staff support and identifies evidence needed for the annual completion review.
- **Verify annual completion and monitor follow through (Section 7.I):** The administering department should develop a completion-and-monitoring BPB with a checklist for all three Policy 1002 completion conditions, links to official Board records, and routing of incomplete requirements. Provide an authorized-action tracker, progress-update template, and method for carrying unresolved actions into the next cycle. Identify which adjustments require renewed Board action and how evidence of Board plan implementation is obtained.

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