# Contents

<table>
<thead>
<tr>
<th>Section</th>
<th>Page</th>
</tr>
</thead>
<tbody>
<tr>
<td>SSBA Background</td>
<td>3</td>
</tr>
<tr>
<td>Document Background</td>
<td>4</td>
</tr>
<tr>
<td>Governance in Saskatchewan Education System</td>
<td>5</td>
</tr>
<tr>
<td>Role of School Boards</td>
<td>6</td>
</tr>
<tr>
<td><strong>Performance Management</strong></td>
<td>8</td>
</tr>
<tr>
<td>Performance Management Overview</td>
<td>9</td>
</tr>
<tr>
<td>Performance Management Cycle</td>
<td>10</td>
</tr>
<tr>
<td>Strategy and Planning</td>
<td>11</td>
</tr>
<tr>
<td>Measure</td>
<td>16</td>
</tr>
<tr>
<td>Report</td>
<td>21</td>
</tr>
<tr>
<td>Evaluate</td>
<td>24</td>
</tr>
<tr>
<td><strong>Performance Management Processes</strong></td>
<td>27</td>
</tr>
<tr>
<td>Organizational</td>
<td>30</td>
</tr>
<tr>
<td>Director of Education</td>
<td>35</td>
</tr>
<tr>
<td>Board</td>
<td>40</td>
</tr>
<tr>
<td><strong>Tools and Techniques</strong></td>
<td>45</td>
</tr>
<tr>
<td>Balanced Scorecard</td>
<td>46</td>
</tr>
<tr>
<td>Board Competency Matrix</td>
<td>48</td>
</tr>
<tr>
<td>Board Behavior Assessment</td>
<td>49</td>
</tr>
<tr>
<td><strong>Appendix</strong></td>
<td>50</td>
</tr>
<tr>
<td>A. Continuous Improvement and Accountability Framework</td>
<td>51</td>
</tr>
<tr>
<td>B. Ministry of Education Core Indicators</td>
<td>52</td>
</tr>
<tr>
<td>C. Reporting Table</td>
<td>53</td>
</tr>
<tr>
<td>D. Forms of Director Performance Measurement</td>
<td>55</td>
</tr>
<tr>
<td>E. Board Evaluation Processes</td>
<td>56</td>
</tr>
<tr>
<td>F. Indicators of Board Effectiveness</td>
<td>57</td>
</tr>
<tr>
<td>G. Documents Reviewed</td>
<td>58</td>
</tr>
</tbody>
</table>
The Saskatchewan School Boards Association (SSBA) plays a critical role in the education sector across the province. As a non-profit organization dedicated to providing leadership and services to Saskatchewan School Boards, the organization provides advocacy, representation, opportunities for development, and the provision of information and services to Saskatchewan School Boards. The SSBA ensures ongoing community involvement and decision making to help shape the education of Saskatchewan’s children.

The SSBA has outlined the following organizational mission and vision:

Mission: Provide leadership, coordination and services to member boards of education to support student achievement.

Vision: By 2025, Saskatchewan has a globally recognized education system that others wish to emulate.

The SSBA represents public, separate and francophone School Divisions and reflects the rural, urban and northern diversity of Saskatchewan. Membership in the SSBA is voluntary. The organization is governed by an Executive comprised of representatives from various constituencies. Additionally, priorities are established by resolutions passed by membership.

Services provided by the SSBA include Board Development, Legal and Employee Relations, Communications, Employee Benefits Plans, and Insurance and Risk Management.
As outlined in the mission and vision on the previous page, the SSBA aims to provide both leadership and guidance to elected Boards across the province. In assisting Boards with effective governance, opportunities to enhance accountability related to educational delivery through performance management effectiveness was identified. The SSBA engaged KPMG to provide support in the development of performance management guide material for SSBA members.

In developing the attached material, KPMG consulted Directors of Education from five School Divisions. This information was used to provide an assessment of the current state, establish a baseline for guidance development and investigate “best-in-class” practices from sector participants. In addition to sector consultation, a review of documentation and leading practices information was conducted and has been incorporated throughout the document.

**Use of this Document**

This document is intended to provide an overview of performance management for School Boards and Board trustees. It is intended to be used in collaboration with other Board Development materials such as existing SSBA development modules, research reports, and ongoing provided training.

Both the Saskatchewan education sector, and leading governance practices continue to evolve and change. This document was written to relate to current practices, and will require updates on an ongoing basis to respond to changes.
The structure of the Saskatchewan Education system is shown at right. As shared responsibility of both the Federal and Provincial government, the sector is led in the province by the Ministry of Education. In fulfilling its responsibility for the education of young people, the Province has delegated local monitoring and guidance to School Boards.
Role of School Boards
Role of School Boards

The *Education Act, 1995* defines the responsibility of School Boards. Section 85 of the Act describes the duties of School Boards. It is important though, to review the Act in its entirety, as additional duties are implied throughout the Act.

School Divisions require effective oversight and governance from its School Board. Defining the roles and responsibilities among the Board and Management for effective governance can be challenging. ‘Best in class’ examples of roles and responsibilities of the Board include those outlined below:

1. The Board should act as the informed voice of the stakeholders of the organization.
2. The Board should be accountable to the stakeholders of the organization for its success. This means that the board’s role is not that of an advisor, but that of an active link in the chain of command.
3. Instructions given by the Board should come from the Board as a whole, and not from individual Trustees.
4. The Board should make decisions and develop policies to guide management and organization.

The Board’s relationship with the CEO, or in the case of School Boards the Director of Education should be clearly defined. Some key components of this relationship include:

- A Board should define and delegate, rather than react and ratify;
- The Board's best control over staff is to set parameters through policy;
- A Board must form a linkage with management that is both empowering and safe;
- Performance of the Director must be monitored against agreed upon criteria;
- The Director should report to the Board as a whole; and
- The Board and the Director should clearly outline expectations on an ongoing basis.
Performance Management
Performance Management is an important tool for School Board and Division accountability. It provides a clear process for evaluation of organizational results, identifying opportunities for improvement, and developing action plans to achieve outcomes and goals.

Performance management is the process of managing and improving performance of individuals, teams and organizations. It involves:

1. Evaluating organizational results against planned outcomes;
2. Identifying opportunities for improvement; and
3. Acting on those opportunities to achieve defined outcomes and goals.

Performance management is an essential component of a governance framework; allowing boards to lead, monitor, respond and be accountable to how an organization delivers against its goals.

Performance management work is integral in enhancing the achievement of goals and outcomes. Unless properly measured and assessed on a proactive basis, the organization will be challenged to progress towards meeting goals in a timely and efficient manner.

Performance management as defined, can provide the organization the needed structured processes to build accountabilities for achieving the organization’s goals. These end-to-end processes are discussed through four key stages described in the following section of this document.

1. Strategy and Plan;
2. Measure;
3. Report; and,
4. Evaluate.

In ensuring effective performance management processes are in place, it is critical the Board ensure that processes are in place to manage key aspects of the organization. Details regarding three key performance management processes are provided later in this document. These processes are performance management of:

1. The Organization
2. The Director of Education; and,
3. The Board
The performance management process is visually outlined below. It is important that the process be considered as ongoing, and that the Board have a clear understanding of the interrelationships of planning, measuring, reporting and evaluating. All steps must be conducted to provide effective performance management on an ongoing basis. The following pages will provide further detail on each of the stages of performance management.
The first step in performance management is planning and strategy development. Strategic planning establishes the direction of the organization. The Strategic Plan provides the foundation for performance management setting expectations and determining planned outcomes. All performance management processes should align with the organization’s Strategic Plan.

Setting the strategic direction of the organization and allocation of resources to strategies including budgets.
Strategic Planning is critical in defining outcomes for the organization. The planning process facilitates agreement on strategic direction and establishing a roadmap that is shared by the organization as a whole.

As outlined below, Boards should make planning a critical organizational task. Planning is a key tool to setting expectations and driving accountability into the organization – if done well.

**Poor Planning...**
- Planning as budgeting
- Decision-making based on perception
- Fragmented view of the business
- Planning as a chore
- Planning as an annual event
- Cost-based view of the business
- Measurement as controlling
- Executing at the tactical level

**Effective Planning...**
- Planning as innovation
- Decision-making based on information
- Holistic, systemic perspective
- Planning as a key management enabler
- Planning as continuous and integrated
- Strategic view of the business
- Measurement as empowering
- Executing at the strategic level

It is important that the planning process consider the multifaceted nature of the organization to ensure diversity of appropriate objectives. The **Balanced Scorecard** described in the ‘Tools’ section (page 43) provides further details regarding the multiple perspectives and components that may be considered.
The Strategic Plan should be a roadmap to achieve through strategies and assigning accountability of the activities required within. The examples chosen below were derived from the Continuous Improvement and Accountability Framework. Please see Appendix A for a more detailed description.

<table>
<thead>
<tr>
<th>Goal</th>
<th>Outcomes</th>
<th>Strategies</th>
<th>Activities</th>
</tr>
</thead>
<tbody>
<tr>
<td>Smooth Transitions</td>
<td>• Pre K and K students show readiness to learn</td>
<td>• Early Learning Programs</td>
<td>• Introduce new Pre-K programs</td>
</tr>
<tr>
<td></td>
<td>• Students transition successfully from Grade 8 to 9</td>
<td>• Orientation and Mentoring</td>
<td>• Joint meetings between elementary and high schools focused on the transition between each</td>
</tr>
<tr>
<td></td>
<td>• Students transition successfully from high school to post-high school opportunities</td>
<td>• Career Planning</td>
<td>• Work Exploration programs</td>
</tr>
<tr>
<td>Equitable Opportunities</td>
<td>• Self-declared First Nations, Métis and Inuit student achievement rates improve in all academic areas</td>
<td>• Learning Improvement Plans</td>
<td>• Targeted professional development</td>
</tr>
<tr>
<td></td>
<td>• Students with enhanced learning needs have access to timely and appropriate programs and services</td>
<td>• First Nations and Métis Action Plan Implementation</td>
<td>• Involve Elders, Advisory Council in supporting students and the educational program</td>
</tr>
<tr>
<td></td>
<td></td>
<td>• Partner with Community Services</td>
<td>• EAL Programs offered in partnership with Open Door Society</td>
</tr>
</tbody>
</table>
The Strategic Planning process should be completed collaboratively between the Board and Management. Inputs including the CIAF, stakeholder feedback, and previous year’s evaluations should be used to guide the strategic planning process. As outlined in the process, the Board plays a key oversight role, with Management performing the ‘legwork’ for plan completion. The final output of the process is the completed plan which guides strategies to achieve outcomes and develops a shared understanding of expectations.
Boards must carefully balance their role in strategy development with their role in objectively assessing strategic plans. As the final check and balance on organizational strategic decisions, Trustees must carefully review the risks and return of proposed plans and be satisfied that the information they are provided is accurate.

There are several questions the Board should be asking in the strategic planning process such as:

• What are the strategic, operational, reputational and financial risks inherent in the strategy and are they in accordance with the organization's appetite for risk?
• How will management track and report the achievement of strategic objectives?
• How does the strategy compare with what others in the sector are doing?
• Can we meet the resource requirements of this strategy now and into the future?
• Will our organizational values and ethics be compromised in any way by execution of this strategy?
• What is the probability that the strategy will be successful and what alternatives exist if expectations are not met?

It is important that the Board have the capacity to challenge the assumptions that management uses to make decisions. Good strategic plans should stand up to scrutiny over their logic, projected outcomes and investments made to support them. Boards should consider the following in assessing the organization’s strategic plan:

1. Goals must be clear, widely communicated and cascade throughout the enterprise
2. Plans must be documented and align with the goals
3. Forecasts must address course corrections required in the Budget and recalibration of the goals
4. Actual / Measurements processes must be timely, accurate and transparent

Boards can effectively monitor strategy only when they are informed and knowledgeable about the strategy and its effect on organizational outcomes. Trustees can request further information and research, and engage external consultants and educators to build a platform of knowledge to participate in high level debate.
The second stage in the performance management process is to identify meaningful measures and indicators to determine if the strategies are achieving desirable outcomes.

Each of the strategies in the plan stage must be measured with one or more key indicators that will describe its success or failure. In choosing appropriate measures, the organization must consider the availability, accuracy and consistency of the information available. Considerations related to choosing effective measures are demonstrated in the following pages.

Developing measurable indicators that can be systematically tracked to assess progress made in achieving predetermined goals.
As the oversight body, it is important that the Board clearly understand various tools and techniques used to assess performance. The definition and language around various measures can be confusing, outlined below are definitions and examples of common tools used in the performance management process.

<table>
<thead>
<tr>
<th>Measure</th>
<th>Definition</th>
<th>Example</th>
</tr>
</thead>
<tbody>
<tr>
<td>Measure</td>
<td>A measure is a standard unit of measurement or the result of a measurement process.</td>
<td>$10 million is a measure of the organization’s expenses.</td>
</tr>
<tr>
<td>Metric</td>
<td>A metric is any kind of measure of an attribute, trait, or characteristic. Metrics lack context and require additional analysis before they provide value and insight to performance.</td>
<td>Employee turnover</td>
</tr>
<tr>
<td>Indicator</td>
<td>Indicators are metrics that point towards a specific condition, state of affairs.</td>
<td>Financial results are considered a lagging indicator of organizational success</td>
</tr>
<tr>
<td>Key Performance Indicator (KPIs)</td>
<td>Key Performance Indicators are those indicators that are material and relevant in assessing the performance of the concerned organizational unit. KPIs are closely tied to organizational goals.</td>
<td>For a School Board that wants to improve student achievement, scores on standardized writing and mathematics exams could be KPIs to monitor and improve achievement in each of its schools.</td>
</tr>
<tr>
<td>Target</td>
<td>A target is a measureable goal or objective to which effort is directed.</td>
<td>85% of students graduate within 3 years of beginning Grade 10.</td>
</tr>
</tbody>
</table>
Measuring organizational performance must be done holistically and consider both qualitative and quantitative information. To overcome the challenges of simply quantitative measures, the Board in collaboration with Management should also establish qualitative measures.

<table>
<thead>
<tr>
<th>Qualitative Measure</th>
<th>Quantitative Measure</th>
</tr>
</thead>
<tbody>
<tr>
<td>Definition</td>
<td>A qualitative measure does not have a defined value. They can often refer to the quality of identity</td>
</tr>
<tr>
<td>Example</td>
<td>Employee Satisfaction</td>
</tr>
<tr>
<td>Challenges</td>
<td>• Often require additional processes to accurately measure</td>
</tr>
<tr>
<td></td>
<td>• Can be costly to gather and assess information</td>
</tr>
<tr>
<td></td>
<td>• Can be difficult to generalize</td>
</tr>
<tr>
<td></td>
<td>• Can be subjective if not properly assessed</td>
</tr>
<tr>
<td></td>
<td>• Can be difficult to quantify and or illustrate progress</td>
</tr>
</tbody>
</table>

For the Board to effectively measure organizational performance they must consider both financial and qualitative measures.
Whatever category a target falls into, it should fulfill certain criteria to serve its purpose of effective performance assessment. As a basic rule, targets must facilitate rather than complicate performance measurement. To this effect, the Board must ensure that the designed targets are SMART.

**Specific:** The targets must be customized and focused towards the area that is being targeted.  
**Measurable:** The targets must be measurable consistently with reliable data.  
**Achievable:** The targeted goal must be within the boundary of achievability. The goal must be set after taking into consideration all factors such as time, material and other pertinent resources. It is also advisable to set certain stretch targets which can give an estimate of what the individual, department or organization can achieve with extra effort.  
**Relevant:** The targets must be relevant to the business goals. Unless there is a clear alignment, there will be little material impact or sometimes even an adverse impact on the organization.  
**Time-bound:** The goals must be assigned to clear timelines to help ensure steady improvements. What is not measured for long tends to get forgotten.

The following simplified examples help to understand the components of this acronym better:

<table>
<thead>
<tr>
<th>Strategy</th>
<th>Activity</th>
<th>Target</th>
<th>Assessment</th>
</tr>
</thead>
<tbody>
<tr>
<td>Successful transitions between Grade 8 and 9</td>
<td>Joint meetings between elementary and high schools focused on the transition between each</td>
<td>98% successful transition of Grade 8’s after 1 year</td>
<td>This provides an example of a SMART target.</td>
</tr>
<tr>
<td>Successful transitions between Grade 8 and 9</td>
<td>Joint meetings between elementary and high schools focused on the transition between each</td>
<td>Each School holds a transition meeting</td>
<td>This target is not SMART. It does not have consistent, reliable data to measure success towards the strategy.</td>
</tr>
</tbody>
</table>
The process to define measures and targets should generally take place in coordination of your strategic planning cycle. Once strategies have been determined, measures of their success should also be defined. Targets should be set, agreed upon and communicated to those responsible for delivery of the strategy to ensure the measure is understood.

<table>
<thead>
<tr>
<th>Inputs</th>
<th>Process</th>
<th>Outputs</th>
</tr>
</thead>
<tbody>
<tr>
<td>Strategies to Achieve Outcomes (Strategic Plan)</td>
<td>Preparation of Measures and Targets</td>
<td>Defined Measures</td>
</tr>
<tr>
<td>Key Indicators of Success in Relation to Strategies (KPI's)</td>
<td>Review and Discussion</td>
<td>Targets</td>
</tr>
<tr>
<td>Baseline Data on Current State</td>
<td>Final Draft of Measures in Strategic Plan</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Approval of Strategic Plan with Measures and Targets</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Strategies, Measures and Targets Communicated</td>
<td></td>
</tr>
</tbody>
</table>

- Board and Management
- Management
- Board
The third stage in the performance management process is to report on progress.

Reporting provides regular updates to assess progress towards objectives. Reporting should be conducted on a continuous basis. The reporting process should routinely provide consistent information on the measures identified in the planning process.
The Board must ensure that it receives accurate, timely, and complete reporting to provide effective oversight over the measures identified in the strategic plan.

Management should provide regular updates to the Board of progress towards organizational goals.

Reporting must be accurate, timely, relevant, and from a consistent source to facilitate ‘apple to apple’ comparisons. Consistent information must be used on an ongoing basis to identify, measure, and actively monitor trends. In some cases, trends take numerous years to fully understand. Boards must find a balance between accessing reporting for adequate oversight without being overloaded with information. Boards should consider the following questions in accessing reporting:

1. What do we need to know to provide effective oversight?
2. When do we need to know it?
3. In what form should it be presented?

It is the Board’s right and responsibility to request any information or reporting it deems necessary to provide effective governance.
The example below outlines the reporting process for performance management. Consistent inputs that directly relate to the defined measures should be used for effective reporting. As outlined in the process, the Board plays a key oversight role, with Management performing the ‘legwork’ for completion. The final output of the process is the requested reporting whether it be in the form of regular Board reports or specific requested reports.

**Inputs**
- Consistent Record Keeping of Data Related to Measures
- Baseline Data from Starting Point

**Outputs**
- Board Reporting Package
- Adhoc Request Responses

**Process**
1. Record Keeping
2. Prepare Reports
3. Summarize
4. Prepare Board Package
5. Review
6. Challenge
The fourth stage in the performance management process is to evaluate progress towards objectives.

The evaluate stage is to determine achievement of stated objectives and goals. Evaluation may be conducted throughout the year on certain targets or only annually for others – however, the outputs from the evaluation process should always assist both Management and the Board to assess whether the strategies and activities identified in the plan are working or whether an adjustment should be made.
The evaluate stage of the performance management cycle provides an assessment of progress towards goals. It is an integral piece in determining goal achievement and identifying any need for proactive adjustment of plans.

Evaluation should include consideration of:

- Actual performance compared to planned performance (goals);
- Actual performance compared to available benchmarks;
- Variance to the above, and;
- Management discussion and analysis of significant variances.

In gathering information, the Board should consider that a more accurate picture of performance may be gained by incorporating the views of several groups. For example, the Board, senior management, School Community Councils, staff members, and the public.

Further information and analysis may be required to fully understand the discrepancy. In addition to areas outlined above, the Board and Management should work to identify if any trends exist in the information. Review of results from previous years may be required to identify trends.

Evaluation of results is critical in improving accountability through performance management. This evaluation may not be conducted through reporting alone. Thorough communication of shortfalls should be conducted with those responsible for achievement. The results of the evaluation are therefore two fold:

1. As an input into performance management to measure achievement
2. As an input into the next planning process to make planning adjustments.
The example below outlines evaluation for organizational performance. Inputs should be used to guide the evaluation process. As outlined in the process, the Board plays a key oversight role, with Management performing the ‘legwork’ for completion. The final output of the process is the completed evaluation which is used as an input into future planning processes.

<table>
<thead>
<tr>
<th>Inputs</th>
<th>Process</th>
<th>Outputs</th>
</tr>
</thead>
<tbody>
<tr>
<td>Strategic Plan</td>
<td>Ongoing Reporting of Performance</td>
<td>Evaluation of Performance</td>
</tr>
<tr>
<td>Measures, Targets and Benchmarks</td>
<td>Preparation and Distribution of Evaluation</td>
<td>Inputs into Future Planning Processes</td>
</tr>
<tr>
<td>Reports of Actual Performance</td>
<td>Review and Discussion of Evaluation</td>
<td></td>
</tr>
<tr>
<td>Balanced Scorecard</td>
<td>Challenge and/or Request</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Additional Information as Needed</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Final Evaluation</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Communicated And Shared</td>
<td></td>
</tr>
</tbody>
</table>

The diagram illustrates the roles of Board and Management in the performance management process.
Performance Management: Processes
In the previous sections, we have provided an overview of the components that comprise a performance management program. The following section provides insights into putting this program into practice.

The responsibility of the Board to oversee the activities and outcomes within the School Division have been broken down into three processes:

1. Measuring Organizational Performance
2. Measuring Director of Education Performance
3. Measuring Board Performance

The above processes will be outlined in further detail in the following pages.
Role of School Boards in Performance Management

As the governing body of the School Divisions, it the Board’s responsibility to ensure appropriate performance management processes are in place. In some cases, the Board should delegate authority or assign responsibility to gather and combine the appropriate information for review and approval. Below is a suggested overview of the Board’s role in performance management.

<table>
<thead>
<tr>
<th>Performance Objective</th>
<th>Process</th>
<th>Approval</th>
</tr>
</thead>
<tbody>
<tr>
<td>Organizational Performance Evaluation</td>
<td>Management should conduct the evaluation process. Management should provide regular updates through reporting.</td>
<td>Board</td>
</tr>
<tr>
<td>Director of Education Appraisal</td>
<td>Board, with Board Chair or committee leading Note: the Board may choose to engage third party assistance as required</td>
<td>Board</td>
</tr>
<tr>
<td>Board Evaluation</td>
<td>Board, through facilitated peer review conducted by Board Chair or committee, or support of 3rd party.</td>
<td>Board</td>
</tr>
</tbody>
</table>
Performance Management: Organization
Performance Management of the Organization is an important Board responsibility. Without adequate performance management processes, the Board is challenged to ensure efficient and effective educational services and supports for students.

Performance management at the Organizational level focuses on evaluating performance in relation to the organization’s Strategic Plan. The process follows the Performance Management cycle defined previously. The following pages provide further detail tailored specifically at the organization level.

Performance management at the organization, Director and Board level collaboratively provide a holistic perspective of key aspects of the Division’s performance. An example at the organizational level is shown below. Further examples are included in Appendix C.

<table>
<thead>
<tr>
<th>Process</th>
<th>Strategies</th>
<th>Activities</th>
<th>Measurement</th>
<th>Target</th>
<th>Report</th>
</tr>
</thead>
<tbody>
<tr>
<td>Organization</td>
<td>Higher Literacy and Numeracy</td>
<td>• Standardized testing completed Division wide</td>
<td>• Percentage of students within the Division completing standardized testing.</td>
<td>• 95% completion</td>
<td>• Standardized testing completion summary.</td>
</tr>
</tbody>
</table>
The first process that will be discussed is measuring organizational effectiveness. This process should provide a high level assessment of the performance of the School Division as a whole. A high level overview of this process is outlined below with further details in the following pages.

Measuring organizational effectiveness provides an assessment of progress toward meeting goals at the organizational or School Division wide level.

Management and the Board analyze results to report to the Ministry and begin planning for the next year.

Management provides regular reports to the Board to assess progress.

The Strategic Plan provides the basis for measuring organizational effectiveness.

Measures outlined in the Strategic Plan and the Budget are tracked by Management and monitored by both Management and the Board.
The key planning processes relating to measuring organizational effectiveness are conducted within the strategic planning and budgeting processes.

Although the content should already be established from the strategic planning and budget processes, it is important that the Board and Management establish an agreed upon performance management process at this stage. In most cases, this involves significant involvement by Management in establishing Appropriate processes and the Board reviewing and approving Proposed processes. Responsibility and timelines should be established to ensure processes are conducted by the right people at the right time to provide the necessary information to the organization.

Within the Strategic Plan, goals and metrics should have been established. SMART goals as outlined on page 17, assist in identifying effective measurements to accurately illustrate progress toward goals. It is important that both quantitative and qualitative measures exist to accurately assess progress.

In addition, the Ministry of Education has also outlined core indicators within the CIAF that must also be measured and monitored on an ongoing basis. These core indicators are provided in Appendix B.

Management holds responsibility for ongoing measurement of organizational effectiveness. For example, Management should provide routine recordkeeping, ensure appropriate systems are in place, etc. The Board and management jointly hold responsibility for ongoing monitoring of progress.
The Board must receive regular reporting updates from Management. Management should provide regular updates of progress towards organizational goals through reporting. Reports should be received at least quarterly. Reporting should provide a basis for evaluation with actual outcomes being compared to planned outcomes.

In assessing organizational performance the Board should receive periodic reports from Management. Suggested report headings may include:

- Strategic issues for discussion
- Emerging issues that may affect the organization
- Value drivers’ performance
- Performance in relation to strategic initiatives outlined in the CIAF
- Financial and non-financial performance

In this stage, the Board and Management evaluate progress towards goals during the time period. This time period should be no longer than a year in length, but may occur several times a year.

For mid-year evaluation, the Board may evaluate progress towards goals using available data and reporting provided to the Board. It is important the Board evaluate as often as possible to proactively identify any need for changes.

In evaluating organizational effectiveness at year end, key documents that may be used by the Board include an annual report prepared by Management, audited financial statement, reporting provided over the course of the year, and reporting submitted to the Ministry of Education.

The evaluation conducted should be documented for consideration in the planning stage.
Performance Management: Director of Education
Performance Management: Director of Education

The Director of Education is appointed by, and accountable to the Board. The relationship between the Board and the Executive Director is extremely important for effective Board governance. It is important the Board understand the importance of and maintain confidentiality in evaluating the performance of the Director.

Measuring Director of Education effectiveness is an important Board responsibility. The performance review provides:

- Important feedback to the Director about their performance.
- An increased understanding of the Director’s concerns and views on the achievement of organizational objectives.
- A forum to build a healthy relationship between the board, especially the chair, and the Director based on trust and honesty.
- A framework for the Director to further develop capabilities.
- A forum to reinforce accountability, transparency and the responsibilities of the Director.
- An opportunity to identify and address early warning signs of possible difficulties.
- An opportunity to discuss any future plans the Director may have (e.g. Retirement).

Performance management at the organization, Director and Board level collaboratively provide a holistic perspective of key aspects of the Division’s performance. An example at the Director level is shown below. Further examples are included in Appendix C.

<table>
<thead>
<tr>
<th>Process</th>
<th>Strategies</th>
<th>Activities</th>
<th>Measurement</th>
<th>Target</th>
<th>Report</th>
</tr>
</thead>
<tbody>
<tr>
<td>Director</td>
<td>Higher Literacy and Numeracy</td>
<td>• Ensure that each school in the division has developed a Learning Improvement Plan</td>
<td>• Percentage of schools with a complete Learning Improvement Plan by September 30 annually</td>
<td>• 100% of schools have a complete Learning Improvement Plan by September 30</td>
<td>• List of all schools who have completed and submitted a Learning Improvement Plan</td>
</tr>
</tbody>
</table>
A high level overview of the performance management process for measuring Director of Education performance is outlined below with further details in the following pages.

In absence of any immediate concerns about Director performance, leading practice indicates that performance reviews should be conducted at least annually, with a formal discussion on progress every six months.
In the planning stage, the Board should work to confirm Performance expectations. It is important that both the Director and the Board have a shared understanding to establish a foundation for performance measurement. The Directors should have an understanding of what needs to be accomplished in the upcoming year. Expectations should be consistent, clear and measurable. Key considerations at this stage include:

• A consistent, agreed-upon process to evaluate the Director’s performance
• The process for setting the expectations should be agreed upon by the Board and Director; the Board should approve the evaluation process
• Performance targets should align to the School Division’s Strategic Plan
• Director compensation and tenure should be tied to performance
• A signed/approved set of targets by both Board Chair and Director

Numerous approaches exist to measure and monitor Director performance. The Board and Director should collaborate to determine the most suitable approach. Some common approaches are outlined in the Appendix D.

Both quantitative and qualitative indicators should be included to assess the Director’s leadership behaviour and performance goals, which are fundamental to sustained organization performance. Using financial and organizational performance alone are inherently problematic. There are numerous factors outside the direct control of the Director that can affect organizational performance. Director performance should be measured on the Director’s own performance, especially against agreed key performance indicators and strategic objectives.
For the Director of Education performance management process to truly be effective, regular reporting and feedback is necessary. In absence of any immediate concerns, formal reporting and feedback should be conducted at least twice annually. A midterm report should be submitted from the Director to the Board with an update of progress toward agreed upon objectives. At mid-year, the Board may also determine that reporting is necessary from other sources such as direct reports, Principals, School Community Councils, etc.

Following review and analysis of the report provided, the Board should ensure that feedback is provided to the Director. This may include a written report, or more commonly a discussion with the Director. The Board may choose to have the Board Chair or Committee Chair hold this discussion on the Board’s behalf.

The midterm reporting process should be clearly documented for review at the annual performance review. This should be a Board prepared document that is signed off by the Director.

The Board and Director analyze results and begin planning for the next year.

The Board should review outcomes related to planned goals. Key considerations include:

- The annual review should be thorough and allow the Director to talk to the Board about the past year’s performance, and allow for the Board to discuss the Director’s performance among themselves
- Feedback should be delivered professionally
- The Board may delegate the evaluation process to the Chair or executive committee

The Board should prepare and provide an evaluation along with corresponding feedback to the Director. If compensation is tied to performance, the Board should also communicate the corresponding impact on the Director’s compensation. Once a thorough evaluation is conducted, it should be reviewed and accepted by both the Board and the Director. The process and outcomes should be clearly documented and filed.
Performance Management: Board
Leading practices in governance indicate that Boards should establish formal processes for evaluating the performance of the Board as a whole, the Chair, and individual Trustees on an ongoing basis. This process should be conducted at least annually and must have full participation of all Trustees to be truly effective. Boards must focus on and evaluate their own effectiveness and efficiency:

• Boards must evaluate themselves to ensure that board structure, composition, infrastructure and behaviors support good governance; and

• Boards must ensure evaluation mechanisms are comprehensive and are embraced.

Board assessments are not merely an assessment done on an annual basis without thought for actions to address improvement areas. Board assessments should be treated as an exercise to improve the Board and move towards high performance. Measuring Board effectiveness will help in fulfilling the Board’s accountability responsibilities and identify areas for improvement. It is important to remember that Board assessment and evaluation exists first to aid individuals towards performance improvement, and only second, to highlight performance shortfalls.

Measuring Board effectiveness should provide the opportunity for regular and timely feedback and assessment. Trustees can proactively identify opportunities for performance and address challenges prior to issue escalation. One example of a feedback mechanism is a survey conducted after each meeting outlining key tasks and outcomes for each meeting and trustee. The survey may have the trustee evaluate his or her preparedness for the meeting, ability to maintain discussion at a strategic level, over all meeting contribution, etc. The Board should ensure that surveys are reviewed and compiled to identify opportunities for continuous improvement. Examples for compiling this information is included in the ‘Tools’ section of this report.

Performance management at the organization, Director and Board level provide an important perspective of key aspects of the Division’s performance. An example at the Board level is shown below.
A high level overview of the performance management process for measuring Board effectiveness is outlined below with further details in the following pages.

In absence of any immediate concerns about Board performance, leading practice indicates that performance reviews should be conducted at least annually.

The Board is responsible for assessing its own effectiveness. The process should be understood and accepted by all Trustees. Performance Management of the Board is most effective when all Trustees are active participants in the process.

The Board Chair or Committee Chair provides regular reporting and feedback.

The Board and trustees establish goals that align with the organization’s Strategic Plan.

Tools for effective measurement are determined and established for ongoing performance monitoring.
A good board evaluation should be structured to measure the linkages between structures, processes and membership through the following elements:

- Skills and competencies of Trustees;
- Accountability and performance mechanisms; and,
- Behaviors of Trustees.

Trustee goals may include being prepared for meetings, consulting constituents, gaining additional relevant experience, etc. Board goals may include attendance goals, providing feedback to the Director on a regular basis, monitoring interpersonal working relationships, etc.

Once appropriate goals have been determined, a process should be established and agreed upon for ongoing measurement of progress towards meeting goals. There are numerous approaches the Board could use. Common approaches include those listed in Appendix E.

The Board and trustees establish goals that align with the organization’s Strategic Plan.

The Board must establish measures and regularly monitor progress towards meeting goals. Appendix F provides examples of indicators of Board effectiveness. Once indicators are established, the Board must determine processes to gather the necessary information to report and evaluate progress.

Tools for effective measurement are determined and established for ongoing performance monitoring.
In this stage, the Board evaluates progress towards goals during the time period. This time period should be no longer than a year in length. Reporting should provide a basis for evaluation with actual outcomes being compared to planned outcomes.

At the end of the time period, the Board Chair or Committee Chair should provide a report indicating the final progress towards goals. This report should be provided to the Board for review and comments prior to being finalized. The report will provide a foundation to guide goal setting for the next year.
Tools and Techniques
The Balanced Scorecard (BSC) is a management “system” that links strategic objectives to performance measures, targets and initiatives. The BSC allows the Board or management to focus on the 10-12 most important performance measures (KPIs) from a strategic perspective. The model is described as balanced as it considers numerous KPIs beyond simply financial in nature.

The BSC can be used as a guide or tool to assist School Divisions in developing effective strategies. Performance should be based on multiple perspectives and components throughout the organization as illustrated by the BSC. Success should not be defined by only one component, without consideration of the wider impacts. It is critical that strategies take a multifaceted approach to motivate the right behaviors throughout the organization.

The BSC typically measures performance from four perspectives:

- **Financial:** This begins with the financial strategy of the organizations. This perspective should answer the questions “to financially sustain our mission, what must we focus on?” This perspective encourages the identification of a few relevant high level financial measures.

- **Stakeholders:** This perspective is at the core of most business strategies. It should answer the questions “to achieve our vision, how should we appear to our stakeholders?” It should also define how a growth objective will be accomplished. For School Boards, the stakeholder perspective should consider students.

- **Internal Business Process:** In order to deliver the customer perspective objectives, an organization must develop very effective processes. This component answers the question “to satisfy our customers, at which operational processes must we excel?”

- **Learning and Growth:** Leadership teams acknowledge the importance of its people and their growth but rarely are there tangible objectives defined for them. This perspective is the foundation of the Strategy since it defines the core competencies, skills, technologies and organizational culture needed to support and organization’s strategy. This perspective answers the question “how will we sustain our ability to change and improve?”

The value of the BSC lies in the organization’s ability to learn from the feedback the BSC provides, to change and develop accordingly, and to test new possibilities and gradually increase your understanding of the complex linkage among financial results, student expectations, business processes, and people and growth for continued organizational success.
The image below provides an overview of the Balanced Scorecard. The Vision and Strategy in the centre is translated into objectives, measures, targets and initiatives from the four key perspectives (budget & financial, student impact, learning and growth, and internal business process). These processes are all interrelated in assessing overall organizational performance.
The Board Competency Matrix provides a tool to compile and assess the composition of a Board. The collective Board must possess a range of competencies to tackle the issues and opportunities a School Division may face. The matrix below includes general competencies, although it is not sufficient to rely on only a generic list of competencies. The Board should discuss the necessary skills needed for effective Board operation. This competency matrix can be completed through a self evaluation process with each trustee evaluating their proficiency related to a given competency, or may be completed by the Board Chair in collaboration with Trustees. The Board may determine an appropriate scoring process.

<table>
<thead>
<tr>
<th>Board Competency Matrix</th>
<th>Director</th>
<th>Average</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>1</td>
<td>2</td>
</tr>
<tr>
<td>General</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Director Experience</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Leadership Role</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Business Acumen</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Business Judgment</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Senior Management Experience</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Strategy/Vision</td>
<td></td>
<td></td>
</tr>
<tr>
<td>People Skills</td>
<td></td>
<td></td>
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<tr>
<td>Communication Skills</td>
<td></td>
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<tr>
<td>...</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Specific/Technical</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Risk Management and Assurance</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Industry Expertise</td>
<td></td>
<td></td>
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<tr>
<td>Financial Literacy</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Financial Expert</td>
<td></td>
<td></td>
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<tr>
<td>Human Resources</td>
<td></td>
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<tr>
<td>Technology</td>
<td></td>
<td></td>
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<tr>
<td>Legal</td>
<td></td>
<td></td>
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<tr>
<td>Teaching Experience</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Education Administration Experience</td>
<td></td>
<td></td>
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<tr>
<td>...</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Average Score</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
The Board Behavior Assessment provides a tool to compile and assess behaviors for effective Board operations. A generic list of possible behaviors is included, although Board should review and discuss necessary behaviors. This tool may be completed through self-assessment to identify Board strengths and weaknesses and identify opportunities for improvement. Best in class review indicates completion of the below table following each Board meeting. Trustees complete a self-evaluation based on his or her performance at the meeting and the Board Chair compiles the information and shares it anonymously. When necessary, the Board chair may decide a confidential discussion with a Trustee is necessary to proactively address opportunities for continuous improvement.

<table>
<thead>
<tr>
<th>Board Behavior Assessment</th>
<th>Director</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>1</td>
</tr>
<tr>
<td>Professionalism</td>
<td></td>
</tr>
<tr>
<td>Accountability</td>
<td></td>
</tr>
<tr>
<td>Time Commitment</td>
<td></td>
</tr>
<tr>
<td>Building Relationships</td>
<td></td>
</tr>
<tr>
<td>Listening</td>
<td></td>
</tr>
<tr>
<td>Problem Solving</td>
<td></td>
</tr>
<tr>
<td>Business Focus</td>
<td></td>
</tr>
<tr>
<td>Making and Impact</td>
<td></td>
</tr>
<tr>
<td>Adds Technical Skills</td>
<td></td>
</tr>
<tr>
<td>Able to Disagree, Without Becoming Disagreeable</td>
<td></td>
</tr>
<tr>
<td>...</td>
<td></td>
</tr>
</tbody>
</table>
Appendix
The Ministry of Education in collaboration with education partners developed the Continuous Improvement Framework (CIAF). The Ministry of Education in collaboration with education partners introduced the CIAF in 2006. The CIAF provides direction to divisions for planning, monitoring and public reporting. The CIAF is organized around four key pillars:

1. Higher Literacy and Achievement;
2. Equitable Opportunities;
3. Smooth Transitions; and
4. System Accountability and Governance.

School Boards are responsible for ensuring preparation and publication of their comprehensive multi-year Continuous Improvement Plan (CIP). In most cases, this means the Board is responsible for ensuring management adequately prepare and publish the CIP. The Board should work collaboratively with management in outlining the process for development and provide oversight at a high level of the process. The Board should be consulted in plan development, and provide approval for the final CIP prior to publication.

It is suggested that School Board Trustees familiarize themselves with the CIAF Guide for School Division Strategic Planning available at the following link:


Appendix A: Continuous Improvement and Accountability Framework
Appendix B: Ministry of Education Core Indicators

The Ministry of Education has established core indicators within the CIAF. These core indicators are updated on an annual basis and may be found within the Ministry’s “Guide for School Division Strategic Planning”. The core indicators for 2012/13 were as follows:

1. **Persistence to complete grade 12**
   a. % of students completing in 3 years
   b. % of those students not completing who are still in school
   c. size of gap for First Nations & Métis students

2. **Average credits per student grades 10, 11 & 12**
   a. credits earned by students getting occasional or frequent supports
   b. size of gap for First Nations & Métis students

3. **Selected grade 10-12 Final Marks**
   a. size of gap for First Nations & Métis students

4. **Treaty Essential Learnings results**
   a. participation rate
   b. size of gap for First Nations & Métis students

5. **Enrolment by Grade**

6. **Education Finance**
   a. Instruction Expenditures by Category as a Percentage of Total Budget

7. **AFL Sub-population Reports (Mathematics, Reading, Writing)**
   a. % of students scoring at a “Proficient” level
   b. size of gap for First Nations and Métis students

8. **Selected School Community Council Survey Results**
   a. % of SCCs with elected & required appointed members
   b. % of SCCs that were provided with orientation, training and development, and networking opportunities
   c. % of SCCs who fully participated in developing the Learning Improvement Plan

9. **Transition Rate from Grades 1 to 10**

10. **Ratio of self-declared FN & M students to FN & M teachers**
Appendix C: Reporting Table

The table on the attached slide provides an example of the relationship between strategies, activities, measurements, targets and needed reporting. As the organizations transitions through the performance management cycle, all of the sections should be completed. Outlined below is the typical timeline for completion:

1. The strategies will be established in the strategic plan development in the ‘plan stage’.
2. The activities will be established in the strategic plan development in the ‘plan stage’.
3. The measurements will be established in the ‘monitor and measurement’ stage to ensure that the organization can determine and assess progress towards goals. Data availability must be considered in determining appropriate measures.
4. The targets will be established after determining the appropriate and available measures.
5. Reporting should be provided on a regular basis. Reporting should align with the stated objectives in the strategic plan as illustrated in the chart.

The information provided in the chart should be used only as an example to improve understanding of the performance management process. Each Board and School Division will have unique requirements which should be reflected throughout the performance management cycle.

The CIAF provides the key pillars that must be considered in the strategic planning process. It is important the Board incorporate and identify local priorities and needs in the planning process. An example of a local priority and the accompanying activities, measurements, targets and reporting is included as an example.
### Higher Literacy and Achievement

- Maintain Reading Effects Program
- Consistent teacher assessment using SD provided guidance
- Investment in resources, professional learning, and strategies to improve literacy

#### Activities
- Participants in Reading Effects Program
- Reading Assessment District (RAD)
- Funds invested into literacy resources

#### Measurement
- 10 participants in Reading Effects Program
- By 2015, 90% of students reading at grade level by end of Grade 3, end of Grade 6 and end of Grade 8
- 5% increase in funds directed at literacy

#### Target
- Participant or attendance summary report for literacy programs
- Consolidated results and analysis of results from RAD
- Year to year funds targeted at resources to improve literacy

### Equitable Opportunities for All

- Develop learning environments and programs conducive to First Nations and Métis belonging
- Development and expansion of Holistic Oral Language Assessment
- Professional learning opportunities for staff to meet the needs of diverse learners

#### Activities
- Investments made into learning environment enhancements and resources targeted at programs for First Nations and Métis belonging
- Number of students with access to Holistic Oral Language Assessment
- Number of Professional Development Opportunities for SD staff

#### Measurement
- Increase investment by 10% from previous year
- 20% more students have access to the Holistic Oral Language Assessment
- 4 SD wide professional development opportunities, and 1 school specialized opportunity for all staff

#### Target
- Year to year funds targeted at First Nations and Métis belonging initiatives
- Number of students with access to Holistic Oral Language Assessment, number of students that accessed the assessment
- Listing of professional development opportunities provided

### Effective, Responsive and Efficient Support Services

- Establish a representative workforce
- Reliable transportation services that minimize ride times for students
- Improved caretaking and maintenance services
- Information technology used to support education and business applications

#### Activities
- Number of self declared minority employees divinized by teachers and non-teachers
- Percentage of students with bus rides over 30, 45, and 60 minutes
- Number of bussing days cancelled due to weather, driver, or mechanical problems
- Student, staff, and parent survey questions regarding cleanliness of schools and maintenance response times
- Average support response time

#### Measurement
- Increase minority teaching staff by 2%, non-teachers by 1%
- Overall reduction of 5% for students riding the bus for over 45 minutes
- 5% reduction in the number of days missed due to driver or mechanical problems
- 80% combined satisfied or very satisfied
- 65% of responses completed in less than 10 days

#### Target
- Percentage increase of minority teachers and staff members
- Year over year change in percentage of students riding the bus for over 45 minutes
- Year over year change in percentage of days missed due to driver or mechanical problems
- Consolidated report of survey results
Appendix D: Forms of Director Performance Measurement

Measures of Executive Director performance management may include:

1. Goals stated in job description, responsibilities, self-set goals
   - Performance of the Director is evaluated based on outlined goals in the job description and goal set by the Director and reviewed and approved by the Board. Should the Board choose this approach, alignment with the organizational strategic plan is critical.

2. Feedback of staff, 360 evaluations
   - Performance of the Director is evaluated based on feedback from various stakeholders. This approach is referred to as a 360 evaluation as it is intended to gather a balanced view from various groups. Stakeholders consulted may include the Board chair, senior management, select SCC chairs, and/or select principals. This process is often conducted with third party support. Should this approach be used, it is critical that the process is conducted in an agreed upon manner and ensure confidentiality throughout.

3. Key stakeholder surveys
   - Similar to the 360 evaluation, this approach intends to gather feedback from various stakeholders. Surveys may reduce the time necessary to complete the evaluation although often does not provide the same level of detail and information as in person interviews with stakeholders.

4. Performance against annual plan, targets, and budget
   - This approach focuses on evaluation based on Director performance related to the annual strategic plan, targets and budget. This approach provides direct alignment with organizational goals although fails to consider areas outside of the Director’s control.

5. Balanced scorecard
   - This approach is described in further detail previously in the report.
In planning process to measure progress toward goals, there are numerous approaches the Board could use. Common approaches include those listed below.

<table>
<thead>
<tr>
<th>Method</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Self-Assessment</td>
<td>Each Trustee completes a self-assessment of themselves and the Chair</td>
</tr>
<tr>
<td>Peer Assessment</td>
<td>Each Trustee (including Chair) will complete a peer assessment of each other Trustee</td>
</tr>
<tr>
<td>Board Effectiveness Assessment</td>
<td>Each Trustee completes a Board Assessment</td>
</tr>
<tr>
<td>Stakeholder Surveys / Interviews (optional)</td>
<td>Electronic survey is sent to a random selection of stakeholders or all stakeholders</td>
</tr>
<tr>
<td>Third-party Interview with Board Chair and Executive Director</td>
<td>A third-party interviews the Chair and Executive Director with the objective of obtaining qualitative information on the Board’s progress</td>
</tr>
<tr>
<td>Analysis</td>
<td>Third-party completes the analysis on the information collected via the assessments and the interviews. Third-party evaluation is desirable to ensure that process remains neutral and objective.</td>
</tr>
</tbody>
</table>
Appendix F: Indicators of Board Performance

It can be difficult to distinguish the difference between measuring the Board and measuring the organization. Although the objectives of each should be aligned, the role of the Board in meeting organizational objectives should be clearly identified in its objectives and measurement tools must directly align with objectives. Outlined below are characteristics of an effective School Board as determined by the National School Board Association’s Centre for Public Education.

Eight Characteristics of an Effective School Board

1. Effective School Boards commit to a vision of high expectations for student achievement and quality instruction and define clear goals toward that vision.

2. Effective School Boards have strong shared beliefs and values about what is possible for students and their ability to learn, and of the system and its ability to teach all children at high levels.

3. Effective School Boards are accountability driven, spending less time on operational issues and more time focused on policies to improve student achievement.

4. Effective School Boards have a collaborative relationship with staff and the community and establish a strong communications structure to inform and engage both internal and external stakeholders in setting and achieving district goals.

5. Effective boards are data savvy; they embrace and monitor data, even when the information is negative, and use it to drive continuous improvement.

6. Effective School Boards align and sustain resources, such as professional development, to meet district goals.

7. Effective School Boards lead as a united team with the superintendent, each from their respective roles, with strong collaboration and mutual trust.

8. Effective School Boards take part in team development and training, sometimes with their superintendents, to build shared knowledge, values and commitments for their improvement efforts.

For additional details, visit http://www.centerforpubliceducation.org/Main-Menu/Public-education/Eight-characteristics-of-effective-school-boards/Eight-characteristics-of-effective-school-boards.html.
In preparation of this document, KPMG reviewed various documents related to governance and the education sector. Below is a list of documentation reviewed for this project.

Saskatchewan School Boards Association Board Governance Modules
Strategic Plans and Annual Reports from Saskatchewan School Divisions.