

Effective Governance

Reviewing school performance

Learning objectives:

After attending this workshop participants will have an understanding of:

- Legislative requirements.
- The internal review process.
- Links between review and future planning.



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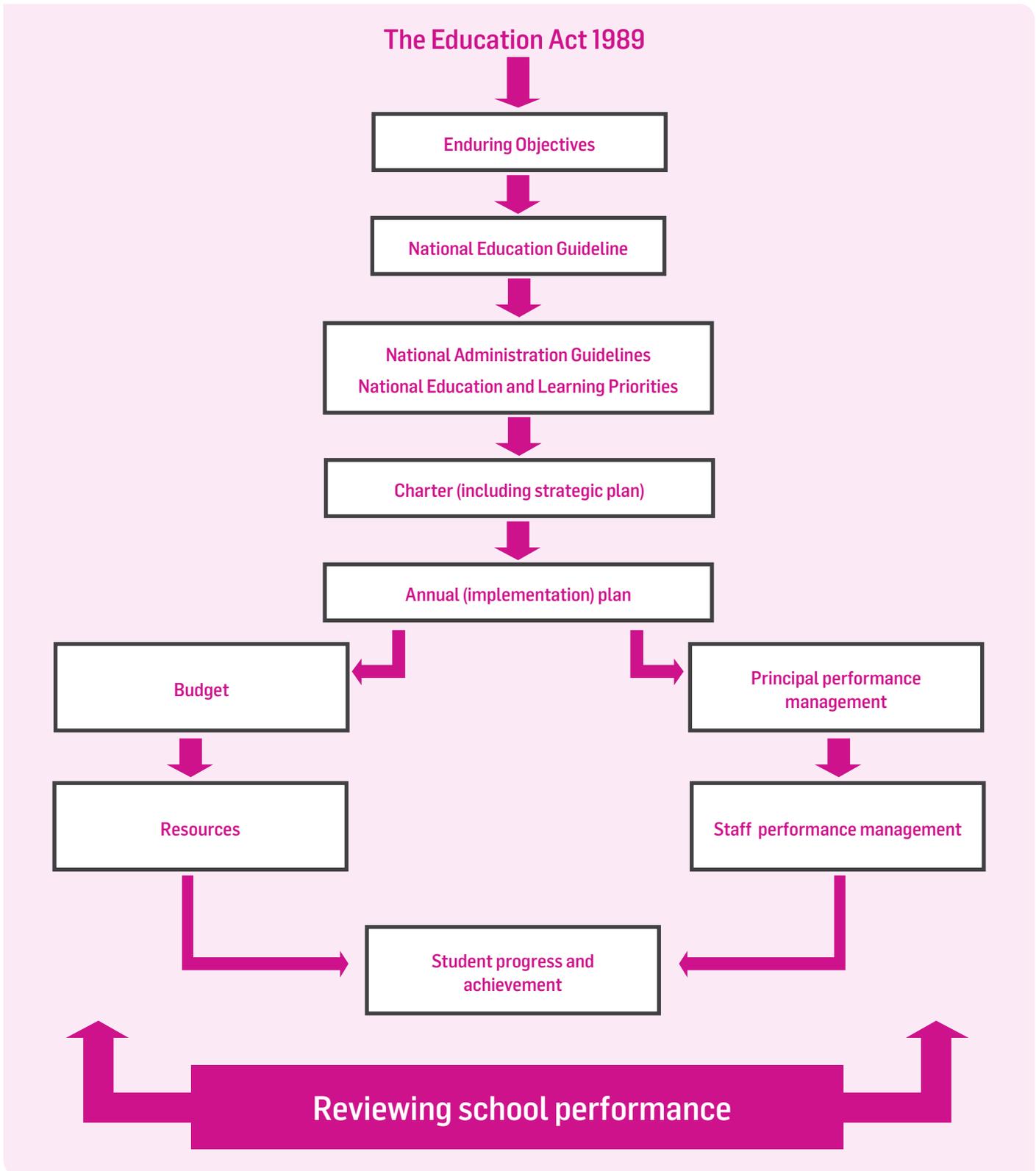


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Legislative framework – the big picture

“A feature of effective schools is that all aspects of their operations are aligned and consistent with the agreed values, aims and priorities. Thoughtful decision-making is evident from the board of trustees, through school managers and personnel, to each individual learner and group of learners. Decisions are made in a cycle of continuous self review and critical reflection.”

Education Review Office – Evaluation at a Glance: What ERO Knows About Effective Schools March 2012



Legislative framework - National Administration Guideline 2

Under the Education Act 1989 all schools are expected to be involved in an ongoing, cyclical process of evaluation and inquiry for improvement. Through the annual reporting process, they are required to report on the achievement of their students, their priorities for improvement, and the actions they plan to take.

Education Review Office – School Evaluation Indicators: Effective practice for improvement and learner success 2016

NAG 2

Each board of trustees, with the principal and teaching staff, is required to:

- a. develop a strategic plan which documents how they are giving effect to the National Education Guidelines through their policies, plans and programmes, including those for curriculum, aromatawai and/or assessment, and staff professional development;
- b. maintain an on-going programme of self-review in relation to the above policies, plans and programmes, including evaluation of good quality assessment information* on student progress and achievement;
- c. on the basis of good quality assessment information* report to students and their parents on progress and achievement of individual students:
 - i. in plain language, in writing, and at least twice a year; and
 - ii. across The National Curriculum, as expressed in The New Zealand Curriculum 2007 or Te Marautanga o Aotearoa, including in mathematics and literacy, and/or te reo matatini and pāngarau;
- d. on the basis of good quality assessment information*, report to the school's community on the progress and achievement of students as a whole and of groups (identified through National Administration Guideline 1(c) above) including the progress and achievement of Māori students against the plans and targets referred to in National Administration Guideline 1(e) above.

* Good quality assessment information draws on a range of evidence to evaluate the progress and achievement of students and build a comprehensive picture of student learning across the curriculum.

Notes

The internal review process

The purpose of review is to establish what is happening and whether it is or is not working. It involves gathering and scrutinising useful data, asking questions and then being willing to make changes in order to improve outcomes. In the case of school boards of trustees the desired outcome is the improved educational achievement and wellbeing of our students.

The internal (self) review process is cyclical and intrinsically linked to the school's planning and reporting cycle.



Step	THE BOARD'S ACTIONS
1. Awareness	Understand the importance of, and requirement to, measure the performance of the school and board.
2. Readiness	Commit to reviewing school and board performance and acting on the findings.
3. Focus	Determine short and long-term focus areas.
4. Review	Investigate, consider and make recommendations .
5. Report	Report to stakeholders on findings and recommended changes.
6. Implement	Ensure implementation of changes and monitor progress.

Steps 1 & 2 – Awareness and readiness

1. Does the board understand its responsibilities around and accountability for the performance of the school?	
2. Is the relationship between the board and the principal open and honest?	
3. Does the board have a review plan in place?	
4. Are staff aware and supportive of the review process?	
5. Are the board, management and staff committed to acting on the findings of any review?	
6. Does the board have capacity and resources to conduct an ongoing, cyclical review programme? (consider engaging support)	

Step 3 – Focus

Measuring the overall performance of the board includes a review of each of the four key areas of governance responsibility. Review is a planned, ongoing process throughout trustees' three-year term of office.

GOVERNANCE	Areas for review	Measures	Frequency
Leadership	Charter - Strategic aims and plan	Strategic aims reflect national and local priorities and aspirations. Plan sets out direction for school for next 3-5 years	
	Annual (implementation) plan	Annual plan outlines how school will implement board's strategic plan Analysis of variance	
	Policy	Governance and operational policies are current and relevant	
	Board process requirements	Appointment of board chair Trustee & potential conflicts of interest register Board annual workplan Committee delegations/Terms of reference Board PD plan Review of board performance against its own workplan Chair performance review New trustee induction	
Accountability	Finance	Annual budget in place Monitoring of income and expenditure Mid-year budget review Annual audited financial report	
	Curriculum	Reporting to board on delivery of all areas of national and local curricula	
	Student progress and achievement	Reporting to board on progress towards annual student achievement targets Annual report to Ministry	

	Student wellbeing	Reporting to board on student wellbeing and behaviour management including stand-downs, suspensions and use of physical restraint NZCER Student wellbeing survey	
	Property	Reporting to board on condition of school property, cyclical maintenance and progress against board's 5-year property plan	
Representation	Community consultation	Regular consultation with school community around its aspirations for its students Consultation with community around delivery of health and physical education curriculum Consultation with Māori community around policies, plans and targets for achievement of Māori students Reporting on progress and achievement of students as a whole Community wellbeing survey	
	Board composition	The composition of the board reflects that of the school's community Succession planning	
Employer	Principal performance management	Performance review process conducted throughout the year End of year report to board	
	Staff performance management	Reporting to the board confirms an ongoing process and highlights any risks/issues Staff wellbeing survey	
	Human resource functions	HR Self-audit	

Step 3 – Focus - The board's three-year review plan

Year 20XX		Board meeting dates 20xx									
Review	Area for review	Feb	Mar	May	Jun	Aug	Sep	Nov	Dec		
Strategic review	Charter/strategic plan	Confirm and approve charter to be submitted to MoE by 1 March							Review of strategic plan Approve next year's review plan	AoV Annual plan draft	
	Strategic aims						Review of strategic aims				
	Policy		Personnel		Health and safety	Governance – concerns and complaints	Curriculum	Finance		Role of the chair	
	Learner progress and achievement	AoV report evaluation by board	Special education needs		Mid-year report post-parent interviews	Māori/Pasifika focus	Gifted and talented			AoV draft	
	HR	Principal performance agreement process	Principal performance agreement approved	HR self-audit 1–3	HR self-audit 4–5		HR self-audit review report Provisional staffing entitlement and funding			Principal appraisal report, recommendations for performance agreement, next year's process	
Regular review	Curriculum		Key competencies		English		The arts				
	Budget	Approve budget	Monitor	Monitor	Mid-year review	Monitor	Monitor	Next year's draft budget		Finalise and adopt draft budget	
	School's evaluative indicators	Monthly report	Monthly report	Monthly report	Monthly report	Monthly report	Update/review 5YA/10YPP	Monthly report		Monthly report	
	Community of Learning/Kāhui Ako		Responsive curriculum		Professional capability and collective capacity			Stewardship			
Emergent review	New government and local initiatives		Community of Learning/Kāhui Ako regularly reported to board through principal's reports								
Board process compliance requirements	Elect chair	Accounts to auditor Charter, AoV submitted to MoE by 1 March	Annual report minuted and sent to MoE by 31 May	Roll return 1 July			Health curriculum consultation				
Board best practice	Role of the chair Delegations Trustee code of behaviour policy										
Board PD			Governance internal evaluation tool (IET) survey				Board self-directed learning			Board self-directed learning	

Source: Governance Framework 2018: Board 3-year review programme/workplan

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	HR	Principal performance agreement process	Principal performance agreement approved								Principal appraisal report, recommendations for performance agreement, next year's process
Regular review	Curriculum		Health and physical education		Learning languages Technology		Mathematics and statistics				
	Budget	Approve budget Monthly report	Monitor Monthly report	Monitor Monthly report	Mid-year review Monthly report	Monitor Monthly report	Monitor Monthly report Update/review 5YA/10YPP	Next year's draft budget Monthly report			Finalise and adopt draft budget Monthly report
	School's evaluative indicators		Responsive curriculum		Professional capability and collective capacity			Stewardship			
	Community of Learning/Kāhui Ako										
Emergent review	New government and local initiatives										
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Board best practice		Role of the chair Delegations Trustee code of behaviour policy									
Board PD		Board self-directed learning	Board self-directed learning	Board self-directed learning	Board self-directed learning	Board self-directed learning	Board self-directed learning	Board self-directed learning	Board self-directed learning	Board self-directed learning	Board self-directed learning

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	HR	Principal performance agreement process	Principal performance agreement approved				Provisional staffing entitlement and funding		Principal appraisal report, recommendations for performance agreement, next year's process
	Curriculum		Science		Social sciences		Technology	Social sciences	
Emergent review	Budget	Approve budget	Monitor	Monitor	Mid-year review	Monitor	Monitor	Next year's draft budget	Finalise and adopt draft budget
	School's evaluative indicators				Monthly report	Monthly report	Update/review 5YA/10YPP	Monthly report	Monthly report
Board best practice	Community of Learning/Kāhui Ako								
	New government and local initiatives								
	Board process compliance requirements	Elect chair	Accounts to auditor Charter, AoV submitted to MoE by 1 March	Annual report minuted and sent to MoE by 31 May	Roll return 1 July		Health curriculum consultation		
	Board PD	Role of the chair Delegations Trustee code of behaviour policy	Board self-directed learning	Board self-directed learning	Board self-directed learning	Board self-directed learning	Governance internal evaluation tool (IET) survey – review of PD	Board self-directed learning	

Source: Governance Framework 2018: Board 3-year review programme/workplan

Step 4 – Review

Type of review	Examples
Strategic review is a long term, in-depth review which focusses on evaluating how well a school is achieving its mission, vision and strategic goals. This review supports board decision-making when setting direction and priorities	To what extent are all our learners experiencing success?
Regular review is a planned, ongoing review focussed on 'business as usual'. This review measures progress towards targets and the effectiveness of programmes. It feeds information into strategic review	To what extent do our policies promote the wellbeing and learning of our students? How effective are our strategies for accelerating progress for target learners?
Emergent review is put in place in response to unplanned events or issues. Often emergent reviews evolve into becoming part of regular review	Student wellbeing and inclusion

Adapted from ERO – Effective internal evaluation for improvement 2016

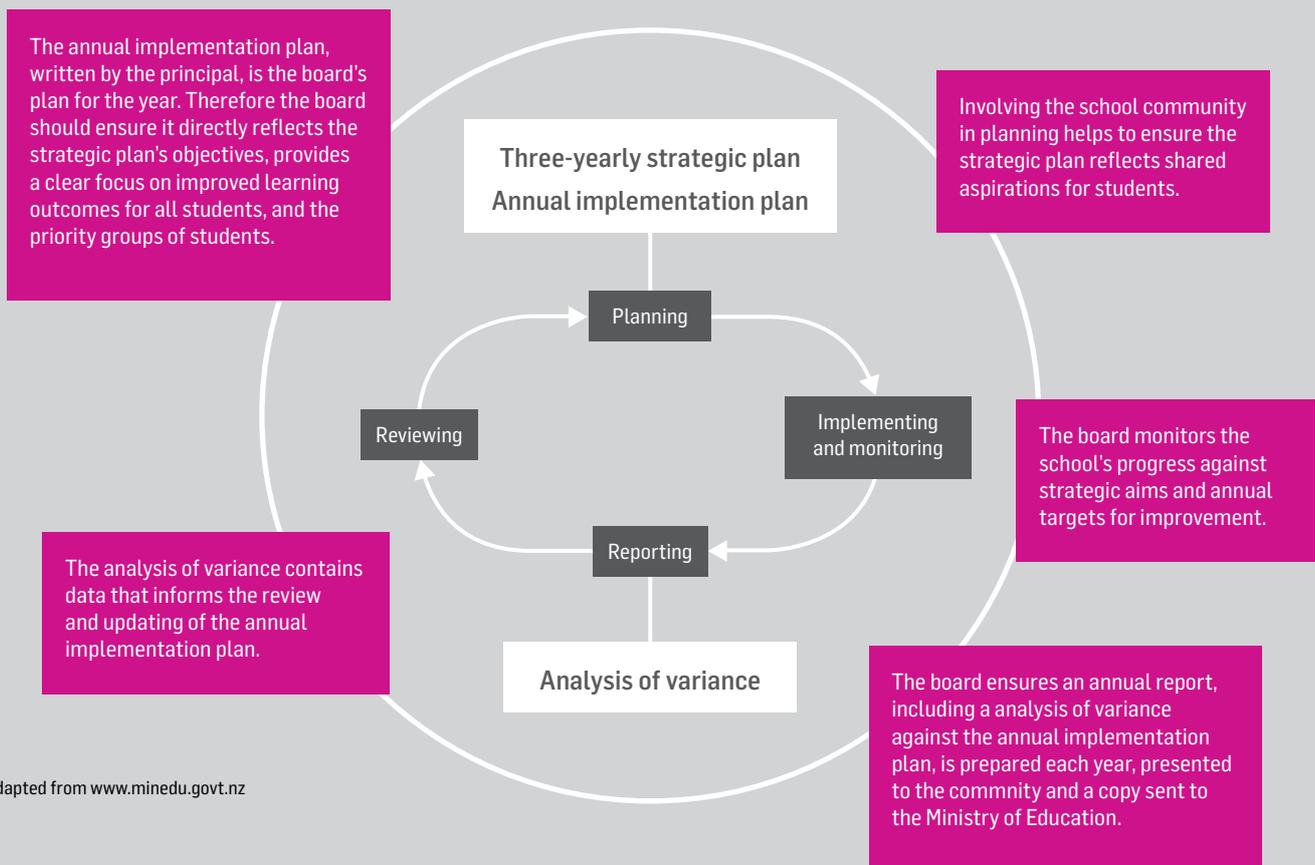
It is useful to have a simple format to follow that ensures trustees explore the information they receive, understand the implications of what is currently happening and then use this information to inform future-focussed decision making.

What?	So what?	Now what?
What information and evidence have we gathered?	What can we learn from this?	What will we do in light of what we have learned?
Student achievement data: What is the current level of student achievement? Who are the students who are not achieving as they should?		
Community consultation: What are the aspirations and expectations of our community – parents, mana whenua, iwi, hapū, whānau, staff and students?		
Environmental scan: strengths, weaknesses, opportunities and threats, including what external factors may impact on the school?		
Trends: what trends and patterns do data from previous years tell us?		

Step 4 – Review: strategic review

Strategic review evaluates activities related to the values and strategic goals of the school. It includes consultation with the school's community, the collection and analysis of data, a review of planning and implementation and monitoring progress towards achieving the school's vision.

Strategic review forms part of the school's planning and reporting cycle.



Monitoring progress towards strategic goals – reporting on implementation of the annual plan.

Reporting on implementation of the annual plan				
Strategic aim:		Baseline data:		
Annual aims:		Targets:		
Actions to achieve targets	Led by	Budget	Timeframe	Progress
Clearly linked to the students' learning needs	Who will lead the work?	Is there a cost? Is it aligned to the budget?	When will the work be completed?	Are we on track to meet the targets we have set?

Step 4 – Review: strategic review



As a board, consider...

1. Is our strategic planning and reporting schedule clearly planned and outlined in the board's 3-year review programme/workplan?
2. Do we really know, understand and base our governance on our school/kura's mission/vision and values?
3. What input did our community have into our mission/vision, values and strategic planning?
4. What input did our staff/kaiako and students/lākonga have into our mission/vision, values and strategic planning?
5. Is our strategic plan sufficiently forward-looking for the next 2 to 3 years?
6. Are our strategic goals deliberately focused on our students?
7. Do our strategic outcomes clearly demonstrate our expectations for our students, principal/tumuaki and staff?
8. Is there a clearly outlined link between our strategic outcomes and the annual (implementation) plans?
9. Are our targets focused on those students who are not achieving as they should be?
10. Do our budget, PLD planning, resourcing, staffing and performance management drop-down from our strategic and annual planning?
11. Is the principal's board reporting directly linked to the annual (implementation) plan at every meeting?

Step 4 – Review: regular review



Policy review

Policy : Trustee code of behaviour				
I have;	Yes	No	Don't know	Comment
Maintained and understood the values and goals of the school				
Ensured the needs of all students and their achievement is paramount				
Been loyal to the organisation and its mission				
Publicly represented the school in a positive manner				
Respected the integrity of the principal and staff				

Policy: Board roles & responsibilities				
Board accountability measure The board has;	Standard	Achieved	Not achieved	Comment
1. Set the strategic direction, long-term plans and monitored the board's progress against them	1.1 Board meets strategic aims			
2. Approved the budget and monitored financial management of the school	2.1 Satisfactory performance of school against budget			

Personnel policy survey and results in our school, the principal:				
Personnel policy statement	Agree	Disagree	Don't know	Comment
Manages in a sound, fair, and respectful manner in accordance with the current terms of employment documents and identified good practice	85%		15%	
Ensures all staff members are aware of the internal grievance process	75%	25%		

Report example					
Role area	Variance	Recommendation	Who	Importance – When	Board input
Employer	25% of staff are unaware of the internal grievance process	That the principal goes over the grievance process with all staff at the next staff meeting	Principal	Important. At next staff meeting	Not required. Principal to report on this at board meeting in xx

Step 4 – Review: regular review

Reports to the board on curriculum and student progress and achievement

Reporting to boards around student educational achievement should contain well-analysed data and comments explaining success and issues that need attention. It should be clear which groups of students are at risk of not achieving and how the principal and teachers intend to support these students to progress.

Schools may also value different types of achievement and these will be reflected in the board's charter and strategic goals. For example; sports, cultural activities, community service, activities that develop children's leadership potential. The board may want the principal to report on how many students are taking part in specific programmes. These reports should also record how well students achieved or made progress.

The board must also receive specific reporting around the achievement of Māori and Pacific students and those with learning needs or special abilities.

In order to set expectations for the reporting of student achievement to the board, trustees can ask the following questions:

What achievement information should the board get?	
How often should the board receive this information?	
Who presents this information?	
What will the board do with this information?	

Key components of good reporting to the board include:

Key questions to answer	Principal's response
What? – What does this report tell us?	
So what? – What questions does it raise?	
So what? – Does it make clear what this means for planning and target setting?	
Now what? – What are the best next steps?	

Step 4 – Review: emergent review

Emergent reviews are put into place in response to an unplanned event or an issue that needs to be addressed promptly. The board should ask: What is happening? Who is it for? Is this okay? Should we be concerned? Why? Do we need to take a closer look?

Possible triggers include:

- Kāhui Ako achievement challenges
- Ministry priorities e.g. student wellbeing
- Enrolment scheme being adopted by a neighbouring school

Emergent reviews are likely to become part of regular review over a period of time.

Step 5 – Reporting



As well as receiving reports as part of its regular review of school performance, the board is required to report to its stakeholders on the progress of the school as a whole.

The board's annual report, including its analysis/statement of variance must be submitted to the Ministry of Education by 31 May. This report is then published on a website controlled by the school as a way of reporting to its community. If the school has no website the Ministry of Education can host the report on its website to enable the board to report to its school community.

Analysis of variance

The board can help ensure the AoV gives a complete picture by asking questions and identifying any gaps in the information.

Strategic Aim 1

All students have the literacy skills necessary for independent learning enabling them to access the New Zealand Curriculum and to reach their potential as learners.

Annual Aim 1

All junior students progressing by at least one curriculum level in literacy (reading & writing).

Target 1.1: Year 9

All students will be achieving at curriculum level 4 or above for reading and writing by the end of Year 9.

Background

A high proportion of students entering Year 9 are behind their expected level of achievement in reading and writing. Only 15% are working at level 4 in reading across the curriculum. On average, students tend to be one – two years behind in literacy with some entering the college reading and writing at a level expected of seven year olds. Accordingly a large focus is placed on literacy in Years 9 to 11.

Actions What did we do?	Result What happened?	Analysis Why did it happen?	Next steps Where to next?
<ol style="list-style-type: none"> 1. Use asTTle assessment data of Year 9 intake to establish baseline and identify particular learning needs of students. 2. PLD for homeroom programme teachers to develop literacy teaching strategies across the curriculum. 3. Student voice used to select reading/learning topics. 4. Regular monitoring of student progress by homeroom programme teacher. 5. Analysis of data to inform progress and planning. 6. Teacher reflection on practice incorporated into performance review. 	<p>The target was not achieved.</p> <p>However, analysis of end of year asTTle data showed on average Year 9 students progressed by two asTTle sub-levels in six months compared to the national norm for this year group being one sub-level.</p> <p>46% of this cohort were reading at or above level 4.</p>	<p>Year 9 and 10 students have an integrated programme that provides a meaningful and relevant curriculum with an emphasis on literacy and numeracy. Successful outcomes require high levels of inter-departmental communication which has not always been achieved. Student feedback also suggests that:</p> <ul style="list-style-type: none"> • teachers were not emphasising the importance of literacy • topics were not always relevant to the group 	<p>Although the target was not achieved there is sufficient evidence that the integrated programme is resulting in accelerated progress to warrant increased resourcing.</p> <p>This will include:</p> <ul style="list-style-type: none"> • building flexibility into the timetable to enable teachers to collaborate and support each other • allocation of management units to enhance co-ordination across departments

Step 6 – Implementation



To complete the internal review process the analysis of variance is used to inform planning for next year.... And the cycle starts again.

Implications for next year's Annual Planning:

- PLD to support the continued focus on literacy across the curriculum.
- Foster the wider use of student voice in the development and review of learning programmes.
- Greater emphasis on targeting of specific students for support relevant to their particular needs.
- Encourage greater engagement of parents and whānau in teaching and learning programmes across the school.
- Teacher performance review to include goal setting linked to annual targets and strategies for target groups.

Review of effective governance - board self assessment checklist



The board has 4 areas of responsibility;

Leadership

Boards provide strategic leadership and direction to schools through the Charter and policy framework which give direction to guide all school activities and decisions. Leadership involves setting direction, vision and strategy to ensure that every student achieves their educational potential.

Representation

School boards, and individual trustees, are elected to act in an independent stewardship role on behalf of those who cannot sit around the board table. This includes effective succession planning, options for governing, the importance of effective and meaningful community consultation and engagement.

Accountability

The board takes its accountability for the performance of students and the school seriously and ensures that the school is well managed, well prepared and on track towards achieving its aims, objectives and targets.

Employer role

The board is the employer of all staff at the school and is responsible for a range of decisions and tasks that arise during the employment relationship. This involves ensuring there are policies, plans and programmes in place to meet all requirements related to this role. This includes what being a good employer means, the appointment of key staff, dealing with staff concerns and complaints and staff performance management.

Leadership	Yes	No	Don't know	Comment
1. Does the board have a clear understanding of governance and management and understand their roles and responsibilities?				
2. Has the board an agreed, documented governance statement?				
3. Has the board a set of clear policies for itself that outline the rules for the board? eg. Board Roles and Responsibilities, Code of Behaviour, Role of the Chair				
4. Has the board a set of clear policies that give bottom line instructions to the principal regarding the boards expectations for the management of the school?				
5. Does the board ensure that every trustee has a governance manual containing all the policies and documentation required in order to fulfil their role?				
6. Does the board have a standing committee structure or mainly ad hoc committees?				
7. Are board committee delegations formally delegated and terms of reference documented?				
8. Does the board lead the Charter review process?				
9. Does the board approve annual goals and strategies?				
10. Does the board understand and protect the special character of the school?				
11. Is the board satisfied that all processes and plans are in place to bring about the values and culture it seeks and to achieve the vision, mission, values, strategic and annual goals and targets?				

12.	Do we use our student achievement data to make decisions and set priorities?				
13.	Does the board focus on policy matters rather than operational issues?				
14.	Has the board identified clear expectations and delegations to the Chair?				
15.	Does the board as a whole monitor and understand the financial management of the school and approve the budget?				
16.	Does every board member take an active role at board meetings?				
17.	Are board meetings conducted in a manner that ensures open communication, meaningful participation, appropriate challenging of management and timely resolution of issues? Do board meetings provide for adequate discussion of issues?				
18.	Is there domination of discussions by some trustees?				
19.	Has the board undertaken any professional development that you are aware of in the last 2 years?				
20.	Does the board have good relationships with stakeholders?				
21.	Do board members treat each other with respect?				
22.	Do you as a board respond constructively to criticism?				
23.	Do you have reason to be optimistic about your ability to deal with whatever the future brings in the next 3 years?				
24.	Is there a code of behaviour in place for all trustees that is adhered to?				
25.	Is the board culturally competent and understand the importance of effective communication with parents, family, whānau?				
Representation		Yes	No	Don't know	Comment
1.	Does the board actively seek trustees from a diverse range to ensure that the board effectively represents its community?				
2.	Does the board have a succession plan in place?				
3.	Does the board provide adequate orientation, training, and evaluation for board members and review the effectiveness? Does the board have an induction programme in place for new trustee				
4.	Do you have difficulty recruiting or retaining credible board members?				
5.	Is there evidence that the board communicates effectively with all parts of the school community?				
6.	Do you know if the school is performing to parent's expectations?				
7.	Does the board ensure that the concerns and complaints process is regularly publicised to the school community?				
8.	Does the board deal effectively with any disputes and conflicts referred to it?				
9.	Do you view students and parents as customers and clients?				
Accountability		Yes	No	Don't know	Comment
1.	Does the board have a good understanding of the current state of student achievement at your school?				
2.	Does the board regularly review performance against the strategic goals and targets?				

3.	Does the board understand the importance of ensuring that the priority groups of students (Māori, Pacifica and students with special education needs) are reported on and are a focus for setting targets?				
4.	Has the board read, discussed and planned the implementation of the following strategies? Ka Hikitia, Success for all and the Pacifica Education Plan?				
5.	Does the board have a 3 year review programme in place and implement it?				
6.	Does your board gather evidence to determine whether its policies are implemented?				
7.	Does the principal give you the information that you expect and need to evaluate your school's performance?				
8.	Does the board receive data that is timely, relevant and user friendly?				
9.	Do you examine your data against gender, ethnicity etc. to measure the success of all students?				
10.	Is your board confident to critique and challenge the information it receives from the principal?				
11.	Do you use the analysis of variance to support the setting of goals and targets for the following year?				
12.	Does your board have a clear process for budget development?				
13.	Do your financial monitoring and control systems enable you to quickly identify errors and protect you from most criminal activities?				
14.	Does your board have a reporting to the board policy?				
15.	Does the board have a 5 and 10 year property plan in place that is implemented and regularly reviewed?				
Employer Role		Yes	No	Don't know	Comment
1.	Does the board have a good understanding of, and does it implement the requirements of being a good employer?				
2.	Is there an effective relationship between the board and the principal?				
3.	Is there a robust principal performance management process in place?				
4.	Does the board understand current employee morale and employee issues and concerns?				
5.	Has the board made delegations through policy to the principal for the day to day running of the school?				
6.	Does the board have effective personnel policies in place that are reviewed regularly?				
7.	Do all staff have an employment agreement?				
8.	Are all required staff registered or have a Limited Authority to Teach at the school?				
9.	Have all staff been appraised during the last 12 months?				
10.	Is the board informed of the staff professional development plan, its objectives and outcomes?				

Source: NZSTA Governance Support Resource - Review of Effective Governance - board self assessment checklist

Personal action planning



In this professional development workshop we have discussed many areas and considered key documentation that will help your board with effective governance. The content, however, only has real effect when applied at your board table.

Use the table to note what will help you and your board towards ongoing improvement in effective governance.

Actions required	Documents needed	Assistance needed	Professional development

Notes



Support and resources



New Zealand School Trustees Association

Te Whakaroputanga Kaitiaki Kura o Aotearoa

www.nzsta.org.nz

0800 782 435

NZSTA Advisory and Support Centre, Governance

govadvice@nzsta.org.nz

NZSTA Advisory and Support Centre, Employment

eradvice@nzsta.org.nz

NZSTA Professional Development

pdadvice@nzsta.org.nz

Ministry of Education

www.education.govt.nz

Education Review Office

www.ero.govt.nz

Effective internal evaluation for improvement 2016

