



Self-Assessment of Professional Standards

Participant's Name: _____ **Date:** _____

Purpose:

This Self-Assessment is to be used in conjunction with the Observer Assessment and Skill Analysis Sheet, available as separate documents. The purpose of using all three documents together is to help you form a realistic picture of your current skill levels. You can accomplish this by comparing your own self-assessment against one or more parallel assessments performed by colleagues who are familiar with your job responsibilities and recent work.

This professional self-assessment process is intended for your personal use. You may share it with mentors, colleagues, and/or other professionals as you see fit.

You and your colleagues are to give honest appraisals of your current practices and on-the-job behavior as they relate to each skill dimension. After you have rated your job practices on the Self-Assessment charts, you will arrive at a total Skill Quotient for each skill dimension. Copy these numbers onto the Skill Analysis Sheet. Then collect and total the Observer Assessment ratings of your colleagues along the same skill sets. By comparing your self-assessed Skill Quotient with the average of those from other observers, you should be able to form a clear picture of your skill levels and how they come across when working with others on the job.

Instructions:

The following skill set is composed of a general definition of the skills to be assessed, followed by two or more skill dimensions (A, B, C, etc.), and a series of specific statements on job behavior.

1. Read the definition for each skill set.
2. Reflect on your current behavior and practices as they relate to the skill area and its definition.
3. Read each behavioral statement within the skill dimensions and circle the number for each item as it best describes your behavior along the given scale. Be honest with yourself. Remember that this self-assessment is intended for your personal use.
4. At the end of each chart, total the numbers you have circled, divide the total by the number of questions in that chart, and enter the total as the Skill Quotient for that particular skill dimension.
5. After completing all of the charts within this skill set, copy each Skill Quotient from this assessment into the separate Skill Analysis Sheet chart, filling it in on the line for each applicable skill dimension.



6. To have a colleague perform an assessment of your skills, download and print the Observer Assessment for the skill set(s) you wish to have assessed and distribute copies to as many colleagues as you'd like in order to collect their perceptions of your behavior.
7. Once you have received the Observer's Assessments, average their Skill Quotients together and enter a final Observer Average into the line on the Skill Analysis Sheet.
8. Finally, using the totals on the Skill Analysis Sheet, subtract the Observer Average from your own self-assessed Skill Quotient and enter the difference into the final column on the chart.
9. Study the results. Differences of plus or minus several points may indicate areas to focus on for professional development.

Questions to consider:

- In which skill dimensions do others see you performing better than you see yourself? In which ones do you see yourself performing better than your observers perceive you to be performing?
- What do you wish to accomplish in resolving the differences between your self-assessment and that of your colleagues? What timeline will you set for yourself in order to check the progress in your professional improvement?

For assistance or additional information, visit the [ASBO International website](#), or contact our Professional Development staff at 866.682.2729 x7074, or by email at aolkin@asbointl.org.



The Educational Enterprise

The public is giving more attention to the relationship between a school’s sound business practices and the quality education of students. Legislative mandates from all levels of government, such as the No Child Left Behind Act in the United States, have drawn more scrutiny about the utilization of resources in schools. School business officials have been recognized as being central to the successful operation of the educational enterprise. School business practices permeate the entire school district. The local education enterprise often maintains the largest budget in the community. Therefore, due to the public’s increased demand for accountability, transparency, and independence; the challenge to do more with less; and the expertise needed to manage the financial resources of the school, the school business official must endorse certain standards in organization and administration, public policy and intergovernmental relations, and the legal framework of our public school districts.

A. Organization and Administration

1 = Almost Never 2 = Rarely 3 = Occasionally 4 = Frequently 5 = Almost Always NA = Not Applicable

1.	I identify and apply various organizational leadership models.	1	2	3	4	5	NA
2.	I identify techniques for motivating others, delegating authority, making decisions, processing information, planning, and allocating resources.	1	2	3	4	5	NA
3.	I examine methods of assigning personnel and resources to accomplish specific goals and objectives, and schedule the coordination of tasks to maximize personnel and resource utilization.	1	2	3	4	5	NA
4.	I identify problems, secure relevant information, and recognize possible causes of conflict.	1	2	3	4	5	NA
5.	I utilize questioning techniques, fact-finding, categorizing information, and retention of relevant data.	1	2	3	4	5	NA
6.	I apply concepts of change, group dynamics, interpersonal relationships, and effective problem solving.	1	2	3	4	5	NA
7.	I delegate and assign responsibilities to staff; collect, analyze, and evaluate information to generate contingency plans; and apply basic concepts of organizational development.	1	2	3	4	5	NA
8.	I maintain a positive working relationship with all staff.	1	2	3	4	5	NA
Add up the circled numbers, divide the sum by 8, and enter the result here:		Organization and Administration Skill Quotient: _____					



B. Public Policy and Intergovernmental Relations

1 = Almost Never 2 = Rarely 3 = Occasionally 4 = Frequently 5 = Almost Always NA = Not Applicable

1.	I develop and apply the policies and roles of all relevant education authorities and local and national governments.	1	2	3	4	5	NA
2.	I identify the role of special interest groups (public and private) within a school district and their ability to influence those who approve district policy.	1	2	3	4	5	NA
3.	I analyze the political and legislative process as it relates to local board elections, municipal governments, state/provincial legislatures, and other governmental jurisdictions.	1	2	3	4	5	NA
4.	I use the skills necessary to interpret and evaluate local school board policies and administrative procedures to ensure consistent application in the daily operation of the school district.	1	2	3	4	5	NA
Add up the circled numbers, divide the sum by 4, and enter the result here:							Public Policy and Inter-Governmental Relations Skill Quotient: _____

C. Legal Issues

1 = Almost Never 2 = Rarely 3 = Occasionally 4 = Frequently 5 = Almost Always NA = Not Applicable

1.	I identify the local and national constitutional rights that apply to individuals within the public and private education system.	1	2	3	4	5	NA
2.	I review and analyze appropriate statutory and constitutional authority regarding the administration of public and private schools.	1	2	3	4	5	NA
3.	I review and analyze significant statutory and case law relative to financial resource management, human resource management, facility management, property management acquisition, information management (including freedom of information and protection of privacy), and management of ancillary services.	1	2	3	4	5	NA
4.	I apply the highest values and ethical standards as they relate to the entire profession of school business administration.	1	2	3	4	5	NA
5.	I protect all stakeholders' interests with respect to responsibility and financial integrity.	1	2	3	4	5	NA
Add up the circled numbers, divide the sum by 5, and enter the result here:							Legal Issues Skill Quotient: _____



Financial Resource Management

School business officials must be able to understand and demonstrate the principles associated with school finance, budgeting, financial planning, accounting, auditing, financial reporting, cash management, investments, debt management, and technology for school business operations.

A. Principles of School Finance

1 = Almost Never 2 = Rarely 3 = Occasionally 4 = Frequently 5 = Almost Always NA = Not Applicable

1.	I apply economic and financial markets/theories.	1	2	3	4	5	NA
2.	I recognize and forecast the major sources of revenue available to the school district from local and national governments and other sources.	1	2	3	4	5	NA
3.	I interpret the relevant governmental funding model.	1	2	3	4	5	NA
4.	I analyze the impact of shifts in local and national funding and the effect on local spending plans.	1	2	3	4	5	NA
5.	I apply multiple techniques for identifying expenditures across cost centers and programs.	1	2	3	4	5	NA
6.	I explore alternative and innovative revenue sources.	1	2	3	4	5	NA
7.	I recognize and analyze significant social, demographic, and economic changes that may impact the financial plan of the district.	1	2	3	4	5	NA
Add up the circled numbers, divide the sum by 7, and enter the result here:		Principles of School Finance Skill Quotient: _____					



B. Budgeting and Financial Planning

1 = Almost Never 2 = Rarely 3 = Occasionally 4 = Frequently 5 = Almost Always NA = Not Applicable

1.	I prepare a budget calendar to meet the time constraints of budget preparation.	1	2	3	4	5	NA
2.	I use multiple approaches to determine reliable enrollment and personnel projections.	1	2	3	4	5	NA
3.	I forecast anticipated expenditures by program.	1	2	3	4	5	NA
4.	I identify various methods of budget analysis and management.	1	2	3	4	5	NA
5.	I apply statistical process control techniques for budgetary analysis.	1	2	3	4	5	NA
6.	I apply the legal requirements for budget adoption.	1	2	3	4	5	NA
7.	I prepare revenue projections and estimates of expenditures for school sites and district-wide budgets.	1	2	3	4	5	NA
8.	I recognize and explain internal and external influences on the budget.	1	2	3	4	5	NA
9.	I maximize state, provincial, and/or national aids for the district.	1	2	3	4	5	NA
10.	I communicate the relationship between programs, revenues, and appropriations of the school district to the stakeholders.	1	2	3	4	5	NA
11.	I develop multi-year budgets that serve as a communications tool for the stakeholders.	1	2	3	4	5	NA
12.	I develop a financial model to monitor a school district's financial health.	1	2	3	4	5	NA
13.	I analyze comparable data of other school districts.	1	2	3	4	5	NA
<p>Add up the circled numbers, divide the sum by 13, and enter the result here:</p>		<p>Budgeting and Financial Planning Skill Quotient: _____</p>					



C. Accounting, Auditing, and Financial Reporting

1 = Almost Never 2 = Rarely 3 = Occasionally 4 = Frequently 5 = Almost Always NA = Not Applicable

1.	I obtain the services of an internal and external auditor.	1	2	3	4	5	NA
2.	I establish and verify compliance with finance-related legal and contractual provisions.	1	2	3	4	5	NA
3.	I communicate the relationship between programs, revenues, and appropriations of the school district to the stakeholders.	1	2	3	4	5	NA
4.	I prepare, analyze, and report financial statements and supporting discussion documents to the board of education throughout the fiscal year.	1	2	3	4	5	NA
5.	I prepare a corrective action plan from the information conveyed in the annual audit report to improve financial tracking and reporting and internal controls and guide the implementation of the plan.	1	2	3	4	5	NA
6.	I apply concepts and standards of accounting relevant to the district's location.	1	2	3	4	5	NA
7.	I adhere to the accounting standards-setting governing body and prepare financial statements in accordance with the most current standards set by such body.	1	2	3	4	5	NA
8.	I report the financial status of the district to the appropriate state/provincial agency in the appropriate regulatory format, which may be on a generally accepted accounting basis or on a customized/regulated basis of reporting.	1	2	3	4	5	NA
<p>Add up the circled numbers, divide the sum by 8, and enter the result here:</p>							<p>Accounting, Auditing, and Financial Reporting Skill Quotient: _____</p>



D. Cash Management, Investments, and Debt Management

1 = Almost Never 2 = Rarely 3 = Occasionally 4 = Frequently 5 = Almost Always NA = Not Applicable

1.	I select professional advisors/contractors such as bond counsel, rating agencies, financial advisors, and underwriters.	1	2	3	4	5	NA
2.	I use lease purchasing and partner with other jurisdictions such as municipalities, counties, and other school districts.	1	2	3	4	5	NA
3.	I develop/recommend investment policies for the governing board to include investment objectives such as maximizing investment income and preserving the investment principal.	1	2	3	4	5	NA
4.	I develop specifications for the selection of banking and other financial services.	1	2	3	4	5	NA
5.	I apply the concept of compensating balances.	1	2	3	4	5	NA
6.	I comprehend procedures and legal constraints for cash collection and disbursement.	1	2	3	4	5	NA
7.	I calculate the yields and understand the risks of various investment options legally available to a school district.	1	2	3	4	5	NA
8.	I apply various methods of cash forecasting.	1	2	3	4	5	NA
9.	I apply appropriate types of short-term debt financing instruments available to school districts.	1	2	3	4	5	NA
10.	I analyze monthly internal transfers and loans.	1	2	3	4	5	NA
11.	I analyze the legal constraints and methods of issuing long-term general obligation bonds, including the bond rating process and the role of the bonding attorney and rating services.	1	2	3	4	5	NA
12.	I analyze the implication of arbitrage rules that may apply to the issuance of long-term general obligation bonds and provide for arbitrage payable when appropriate.	1	2	3	4	5	NA
13.	I prepare a cash flow analysis, including a fund balance report, for the board of education.	1	2	3	4	5	NA
14.	I review accrued receivables and understand permitted collection processes.	1	2	3	4	5	NA
<p>Add up the circled numbers, divide the sum by 14, and enter the result here:</p>		<p>Cash Management, Investments, and Debt Management Skill Quotient: _____</p>					



E. Technology for School Finance Operations

1 = Almost Never 2 = Rarely 3 = Occasionally 4 = Frequently 5 = Almost Always NA = Not Applicable

1.	I keep current with technology applications and programs.	1	2	3	4	5	NA
2.	I assess the district's needs related to available budget dollars for technology.	1	2	3	4	5	NA
3.	I ensure that the district's technology plan is designed to meet the district's goals.	1	2	3	4	5	NA
4.	I develop an operational plan to meet the district's financial goals and objectives.	1	2	3	4	5	NA
5.	I apply economic and financial markets/theories.	1	2	3	4	5	NA
6.	I recognize and forecast the major sources of revenue available to the school district from local and national governments and other sources.	1	2	3	4	5	NA
7.	I interpret the relevant governmental funding model.	1	2	3	4	5	NA
8.	I analyze the impact of shifts in local and national funding and the effect on local spending plans.	1	2	3	4	5	NA
9.	I apply multiple techniques for identifying expenditures across cost centers and programs.	1	2	3	4	5	NA
10.	I explore alternative and innovative revenue sources.	1	2	3	4	5	NA
11.	I recognize and analyze significant social, demographic, and economic changes that may impact the financial plan of the district.	1	2	3	4	5	NA
<p>Add up the circled numbers, divide the sum by 11, and enter the result here:</p>							<p>Technology for School Finance Operations Skill Quotient: _____</p>



Human Resource Management

In the education sector, the critical importance of human resource management is the administration and monitoring of personnel, benefits, professional development, labor relations, employment agreements, and the fostering of human relations.

Human resource management, while involving many day-to-day practical considerations, also requires an understanding of both theory and practice, recognizing that theory often determines practice. School business officials cannot fulfill their human resource management role efficiently and effectively without being aware of relevant management concepts and theories as well as local and national rules and regulations.

A. Personnel and Benefits Administration

1 = Almost Never 2 = Rarely 3 = Occasionally 4 = Frequently 5 = Almost Always NA = Not Applicable

1.	I coordinate the development and management of an appropriate personnel database to provide seamless integration with payroll and other school district functions.	1	2	3	4	5	NA
2.	I manage and continually evaluate the effectiveness of the school district's payroll operations.	1	2	3	4	5	NA
3.	I administer employment agreements, including interpreting contract language, considering the concepts of "past practice," "just cause" provisions, and grievance procedures.	1	2	3	4	5	NA
4.	I assist with the processes related to the recruitment, selection, orientation, assignment, evaluation, and termination of school district personnel.	1	2	3	4	5	NA
5.	I ensure the selection and hiring of the most qualified individuals for positions, adhering to all local and national rules and regulations.	1	2	3	4	5	NA
6.	I research and explain various compensation arrangements, including salaries and wages, employee healthcare benefit programs, and retirement options.	1	2	3	4	5	NA
7.	I coordinate the procedures for termination of employment, including the concept of "due process," and an awareness of the procedures, usually governed by collective bargaining agreements, with respect to reduction in work force.	1	2	3	4	5	NA
Add up the circled numbers, divide the sum by 7, and enter the result here:							Personnel and Benefits Administration Skill Quotient: _____



B. Professional Development

1 = Almost Never 2 = Rarely 3 = Occasionally 4 = Frequently 5 = Almost Always NA = Not Applicable

1.	I conduct needs assessments to identify areas and content for training and development.	1	2	3	4	5	NA
2.	I build a professional development system, based primarily on adult motivation research, to improve the performance of staff members and to assist staff in meeting the educational objectives of the school district.	1	2	3	4	5	NA
3.	I ensure all staff meet training and continuing education requirements to comply with local and national rules and regulations.	1	2	3	4	5	NA
4.	I identify appropriate procedures for the management and evaluation of professional development programs.	1	2	3	4	5	NA
5.	I involve all school district staff in determining their professional development needs that can significantly enhance the effectiveness of employee training and development programs.	1	2	3	4	5	NA
<p>Add up the circled numbers, divide the sum by 5, and enter the result here:</p>							<p>Professional Development Skill Quotient: _____</p>

C. Labor Relations and Employment Agreements

1 = Almost Never 2 = Rarely 3 = Occasionally 4 = Frequently 5 = Almost Always NA = Not Applicable

1.	I analyze jurisdictional and governmental laws and regulations with respect to employment agreements.	1	2	3	4	5	NA
2.	I continually conduct and analyze benchmark surveys to assess the cost of current salary and employee benefit packages and proposals.	1	2	3	4	5	NA
3.	I analyze current employment contracts and/or collective bargaining agreements and develop comparative reports with local and national agreements.	1	2	3	4	5	NA
4.	I identify and monitor compliance with the grievance procedures as set out in employment agreements and local and national laws.	1	2	3	4	5	NA
5.	I review local and national laws and regulations with respect to impasse procedures such as mediation, voluntary arbitration, and binding arbitration.	1	2	3	4	5	NA
<p>Add up the circled numbers, divide the sum by 5, and enter the result here:</p>							<p>Labor Relations and Employment Agreements: Skill Quotient: _____</p>



D. Human Relations

1 = Almost Never 2 = Rarely 3 = Occasionally 4 = Frequently 5 = Almost Always NA = Not Applicable

1.	I diagnose, maintain, and, when necessary, improve organizational health and morale, including increasing focus on employee wellness programs.	1	2	3	4	5	NA
2.	I develop policies and procedures for the management of school district personnel.	1	2	3	4	5	NA
3.	I develop employee assistance programs and evaluate their impact on the school district's staff morale.	1	2	3	4	5	NA
4.	I frequently monitor performance through constructive evaluations, including a comparison of standards and goal-setting to ensure accountability.	1	2	3	4	5	NA
5.	I identify and implement procedures for conflict resolution and team building to enhance morale and productivity.	1	2	3	4	5	NA
6.	I help create a high-performance work system by fostering open communication and feedback throughout all levels of the district.	1	2	3	4	5	NA
7.	I recognize and promote compliance with standards of ethical behavior and standards for professional conduct applicable to all school district staff.	1	2	3	4	5	NA
8.	I stay current with management theory and leadership styles, including concepts of behavioral science, organizational structure theory, developing and maintaining organizational culture, and managing organizational change.	1	2	3	4	5	NA
<p>Add up the circled numbers, divide the sum by 8, and enter the result here:</p>							<p>Human Relations Skill Quotient: _____</p>



Facility Management

Research on learning has validated the effect of the environment on the learner. Factors such as sound, light, temperature, and the design of space affect the ability of individuals to learn and work. Hence, effective and efficient facility management contributes to the educational process by providing the environment in which instructional programs are delivered. Expertise in areas such as physical plant planning, accountability for capital resources, and administration of the substantial public investment in schools are basic performance competencies for school business officials.

A. Planning and Construction

1 = Almost Never 2 = Rarely 3 = Occasionally 4 = Frequently 5 = Almost Always NA = Not Applicable

1.	I develop a long-range facility plan that includes demographic data, and I serve as an integral member of the planning team.	1	2	3	4	5	NA
2.	I develop a working knowledge of funding sources and issues related to school construction, including bond ratings, the rating process, and bond election processes.	1	2	3	4	5	NA
3.	I develop appropriate procedures for selecting architects, engineers, construction managers, and other professionals.	1	2	3	4	5	NA
4.	I apply the steps and procedures involved in developing and using education specifications for selecting school sites.	1	2	3	4	5	NA
5.	I review the legal and administrative responsibilities for advertising, awarding, and managing construction contracts.	1	2	3	4	5	NA
6.	I recognize the impact of energy and environmental factors on the learning process.	1	2	3	4	5	NA
7.	I meet the requirements of local and national agencies regarding construction and renovation of school facilities.	1	2	3	4	5	NA
8.	I communicate financial implications of unanticipated issues during the construction process to appropriate personnel in order to guarantee project solvency.	1	2	3	4	5	NA
9.	I involve appropriate existing district/agency personnel who have experience with local energy demands, materials choices, and contractor regulations to share their concerns during construction job progress meetings.	1	2	3	4	5	NA
Add up the circled numbers, divide the sum by 9, and enter the result here:		Planning and Construction Skill Quotient: _____					



B. Maintenance and Operations

1 = Almost Never 2 = Rarely 3 = Occasionally 4 = Frequently 5 = Almost Always NA = Not Applicable

1.	I administer procedures required to keep schools clean, safe, and secure through effective custodial services and preventive maintenance.	1	2	3	4	5	NA
2.	I manage energy consumption and environmental aspects.	1	2	3	4	5	NA
3.	I determine resource allocation for maintenance and operations.	1	2	3	4	5	NA
4.	I develop a crisis management plan.	1	2	3	4	5	NA
5.	I maintain a positive working relationship with staff, contractors, and suppliers.	1	2	3	4	5	NA
6.	I am knowledgeable of sources of alternative revenue (other than debt or tax levies) such as grant revenue to meet facility needs.	1	2	3	4	5	NA
7.	I am able to effectively form partnerships with the private sector to enhance resources available to the district in regard to facilities and equipment.	1	2	3	4	5	NA
8.	I utilize technology to improve facilities through data management.	1	2	3	4	5	NA
Add up the circled numbers, divide the sum by 8, and enter the result here:		Maintenance and Operations Skill Quotient: _____					



Property Acquisition and Management

Effective acquisition of property, materials, equipment, and services requires a systematic purchasing system operated by established procedures and managed by competent professionals. Acquiring the products and services needed for the educational enterprise is an integral part of the instructional program. Accountability in education begins with the procurement of school property and materials. Effective, efficient, and proper procurement of property, materials, equipment, and services supports accountability in education. School business officials coordinate the economic, efficiency, and cost-effectiveness of property acquisition and management according to appropriate laws and ethical practices.

A. Purchasing

1 = Almost Never 2 = Rarely 3 = Occasionally 4 = Frequently 5 = Almost Always NA = Not Applicable

1.	I develop and implement an integrated purchasing process that complies with all government regulations.	1	2	3	4	5	NA
2.	I adhere to a strict code of purchasing and procurement ethics.	1	2	3	4	5	NA
3.	I develop and implement a bid procurement system that complies with all government regulations.	1	2	3	4	5	NA
4.	I analyze and, if feasible, implement an e-procurement system that complies with all government regulations.	1	2	3	4	5	NA
5.	I obtain good value for each procurement.	1	2	3	4	5	NA
6.	I properly and effectively apply the rules, regulations, and statutes that govern school procurement.	1	2	3	4	5	NA
7.	I determine and produce the most appropriate method of source selection for each procurement.	1	2	3	4	5	NA
8.	I formulate competitive procurement solicitations that are fair and reasonable and that promote open competition.	1	2	3	4	5	NA
9.	I conduct all procurement without conflict of interest, impropriety, or any attempt to obtain personal gain.	1	2	3	4	5	NA
Add up the circled numbers, divide the sum by 9, and enter the result here:							Purchasing Skill Quotient: _____



B. Supply and Fixed Asset Management

1 = Almost Never 2 = Rarely 3 = Occasionally 4 = Frequently 5 = Almost Always NA = Not Applicable

1.	I develop and implement a system to manage and track supply inventories and distribution.	1	2	3	4	5	NA
2.	I develop and implement a program for the effective current and long-range acquisition, maintenance, and repair of equipment.	1	2	3	4	5	NA
3.	I develop a system to reallocate and/or dispose of surplus, scrap, and obsolete materials and equipment.	1	2	3	4	5	NA
4.	I develop and implement a system for the proper valuation, classification, and depreciation of fixed assets.	1	2	3	4	5	NA
5.	I develop and implement a system to adequately control and account for capital assets.	1	2	3	4	5	NA
Add up the circled numbers, divide the sum by 5, and enter the result here:							Supply and Fixed Asset Management Skill Quotient: _____

C. Real Estate Management

1 = Almost Never 2 = Rarely 3 = Occasionally 4 = Frequently 5 = Almost Always NA = Not Applicable

1.	I coordinate with other government agencies regarding zoning, land use, and other real estate issues.	1	2	3	4	5	NA
2.	I develop and implement procedures for the acquisition and disposal of land and buildings.	1	2	3	4	5	NA
3.	I develop and implement a use of facility system that complies with all government regulations.	1	2	3	4	5	NA
Add up the circled numbers, divide the sum by 3, and enter the result here:							Real Estate Management Skill Quotient: _____



Information Management

In a technological environment where information flows to and from school organizations in gigabytes per second, the prerequisite competencies to direct, protect, analyze, and update this information has become a primary focus for school business officials. Ultimately, information management is more than simply overseeing technical data; it also involves the presentation and articulate communication of information to key decision-making individuals and groups.

A. Strategic Planning

1 = Almost Never 2 = Rarely 3 = Occasionally 4 = Frequently 5 = Almost Always NA = Not Applicable

1.	I participate in administrative and employee teams in the identification of short- and long-term goals in all aspects of school district activities.	1	2	3	4	5	NA
2.	I assist with the development and communication of a vision of the preferred future of the school district, drawing from current research and best practice.	1	2	3	4	5	NA
3.	I assist in the development of a strategic plan that will move the district toward the achievement of its mission and goals.	1	2	3	4	5	NA
4.	I assist in providing the data required to facilitate the strategic planning process.	1	2	3	4	5	NA
5.	I assist in the implementation, monitoring, evaluation, reporting, and revision of a strategic plan.	1	2	3	4	5	NA
Add up the circled numbers, divide the sum by 5, and enter the result here:							Strategic Planning Skill Quotient: _____

B. Instructional Support Program Evaluation

1 = Almost Never 2 = Rarely 3 = Occasionally 4 = Frequently 5 = Almost Always NA = Not Applicable

1.	I apply a practical and research-based knowledge of the components and skills to evaluate programs and business services.	1	2	3	4	5	NA
2.	I identify various economic and cost factors inherent in program operation and evaluation.	1	2	3	4	5	NA
3.	I develop and apply procedures for the systematic evaluation of instructional support programs.	1	2	3	4	5	NA
4.	I analyze, develop, and apply various methods of measuring instructional goals and program effectiveness.	1	2	3	4	5	NA
5.	I effectively manage a change process when evaluation determines that instructional support programs must be improved.	1	2	3	4	5	NA
Add up the circled numbers, divide the sum by 5, and enter the result here:							Instructional Support Program Evaluation Skill Quotient: _____



C. Instructional Program Evaluation

1 = Almost Never 2 = Rarely 3 = Occasionally 4 = Frequently 5 = Almost Always NA = Not Applicable

1.	I support the components of the instructional programs within the school district.	1	2	3	4	5	NA
2.	I participate in the planning and implementation of instructional program improvement.	1	2	3	4	5	NA
3.	I analyze the various economic factors associated with the delivery and evaluation of instructional programs.	1	2	3	4	5	NA
4.	I develop procedures for the evaluation and reporting of the cost effectiveness of instructional programs.	1	2	3	4	5	NA
5.	I utilize evaluation data toward the development of instructional program changes.	1	2	3	4	5	NA
6.	I effectively participate in the change process when instructional programs must be improved.	1	2	3	4	5	NA
7.	I assist in directing and facilitating the allocation of resources within the school district toward the improvement of instructional programs.	1	2	3	4	5	NA
8.	I assist in directing and promoting the allocation of resources for professional development, leading to improved instructional programs.	1	2	3	4	5	NA
<p>Add up the circled numbers, divide the sum by 8, and enter the result here:</p>							<p>Instructional Program Evaluation Skill Quotient: _____</p>

D. Communications

1 = Almost Never 2 = Rarely 3 = Occasionally 4 = Frequently 5 = Almost Always NA = Not Applicable

1.	I comprehend effective communication strategies and techniques related to mass and interactive communications.	1	2	3	4	5	NA
2.	I identify the primary components of public information management and public relations.	1	2	3	4	5	NA
3.	I have a clear understanding of the major constituencies within the school district.	1	2	3	4	5	NA
4.	I present financial data to various school and community groups in written, oral, and multi-media formats.	1	2	3	4	5	NA
5.	I assist in the development of a plan for a positive school–community relations program for the business office and the school district.	1	2	3	4	5	NA
6.	I assist in the development of procedures for the management of public information programs and departments that relate to school–community relations.	1	2	3	4	5	NA
<p>Add up the circled numbers, divide the sum by 6, and enter the result here:</p>							<p>Communications Skill Quotient: _____</p>



E. Management Information Systems

1 = Almost Never 2 = Rarely 3 = Occasionally 4 = Frequently 5 = Almost Always NA = Not Applicable

1.	I direct or develop management information systems.	1	2	3	4	5	NA
2.	I apply the most current technology to the storage, analysis, and communication of data (email, administrative and educational computer systems, etc.).	1	2	3	4	5	NA
3.	I evaluate the cost benefits and organizational value of producing information.	1	2	3	4	5	NA
4.	I develop, maintain, and validate a records management system using appropriate technology that complies with all legal requirements.	1	2	3	4	5	NA
5.	I develop and maintain an accurate database to facilitate management decisions using current information management techniques.	1	2	3	4	5	NA
6.	I administrate a computerized management information system.	1	2	3	4	5	NA
7.	I ensure that appropriate data security and privacy of records are maintained.	1	2	3	4	5	NA
8.	I assist in the integration and gathering of information for public relations purposes.	1	2	3	4	5	NA
9.	I assist in and coordinate the gathering and reporting of information for government reports.	1	2	3	4	5	NA
10.	I maintain and protect the historical records archive of the school district.	1	2	3	4	5	NA
11.	I assist in the development and implementation of technology in the business office and the classroom environment.	1	2	3	4	5	NA
12.	I maintain a working knowledge of the technology and software available for school and business office use.	1	2	3	4	5	NA
13.	I direct or develop specific plans for secure student and employee access to the Internet.	1	2	3	4	5	NA
14.	I evaluate the cost of Internet access options for the school district.	1	2	3	4	5	NA
15.	I evaluate and apply various technology tools for use in the school and business office.	1	2	3	4	5	NA
16.	I assist in the development of long-range technology planning for the school district.	1	2	3	4	5	NA
17.	I promote and assist in the development of technology training for all staff.	1	2	3	4	5	NA
18.	I allocate appropriate resources toward the purchase and installation of technology and technology infrastructures in the business office, the school office, and the classroom	1	2	3	4	5	NA
19.	I develop appropriate specifications for purchasing technology and contracting for technology infrastructure for the school district.	1	2	3	4	5	NA
<p>Add up the circled numbers, divide the sum by 19, and enter the result here:</p>		<p>Management Information Systems Skill Quotient: _____</p>					



Ancillary Services

A. Risk Management

All schools risk suffering loss or damage to their property, personnel, and reputation, which may affect their ability to deliver services. Risk management and contingency planning can be used to anticipate and limit those risks that may affect the activities of the school.

Risk management also plays a role in developing standards of benchmarking, best practices, and performance measurement. Financial standards such as claim statistics and cost-of-risk analysis are important measures of efficiency but are not true measures of risk management effectiveness when used alone. Other areas that must be measured include strategies to contain costs of workers' compensation, litigation management, employee relations, loss control, and cost containment.

1 = Almost Never 2 = Rarely 3 = Occasionally 4 = Frequently 5 = Almost Always NA = Not Applicable

1.	I ensure that a comprehensive risk management program is in place.	1	2	3	4	5	NA
2.	I ensure the risk management program addresses safety and security.	1	2	3	4	5	NA
3.	I assess risk management programs and recommend changes consistent with district needs.	1	2	3	4	5	NA
4.	I identify and apply models for the evaluation of potential risk management programs.	1	2	3	4	5	NA
5.	I identify and evaluate alternative methods of funding and managing risk.	1	2	3	4	5	NA
6.	I communicate the risk management program to all stakeholders.	1	2	3	4	5	NA
7.	I direct the process of selecting/employing an insurance consultant or risk manager.	1	2	3	4	5	NA
8.	I adhere to legal requirements for insurance coverage.	1	2	3	4	5	NA
Add up the circled numbers, divide the sum by 8, and enter the result here:							Risk Management Skill Quotient: _____



B. Transportation

The transportation of students is a major logistical task for all school districts. In addition to getting the students to and from school, the system must provide transportation for field trips and cocurricular activities. In the United States, it is one of the largest public mass transportation systems. Given the volume of vehicles, passengers, and miles traveled, transportation management can be a daunting challenge.

1 = Almost Never 2 = Rarely 3 = Occasionally 4 = Frequently 5 = Almost Always NA = Not Applicable

1.	I support and maintain a student transportation program that adheres to all legal requirements.	1	2	3	4	5	NA
2.	I ensure that the school bus maintenance and replacement program is established and maintained.	1	2	3	4	5	NA
3.	I monitor the student transportation program for its safety, security, and efficiency, and make adjustments as needed	1	2	3	4	5	NA
4.	I analyze alternative methods available for providing transportation.	1	2	3	4	5	NA
5.	I ensure an efficient and comprehensive routing system is developed and maintained.	1	2	3	4	5	NA
6.	I ensure a comprehensive plan is in place that includes an analysis of what transportation requirements are and the basic features of a system to provide pupil transportation, and where appropriate, arrangements for screening, training, re-training, and retaining bus drivers, paraprofessionals, and other essential transportation personnel.	1	2	3	4	5	NA
7.	I develop and maintain open and clear lines of communication with parents, staff, administration, state/provincial legislatures, and the public for the purpose of conveying the responsibilities, needs, and expectations of all stakeholders.	1	2	3	4	5	NA
Add up the circled numbers, divide the sum by 7, and enter the result here:							Transportation Skill Quotient: _____



C. Food Service

International studies confirm that children who eat nutritious meals perform better academically, show improved behavior, and are physically healthier. School districts use different approaches to ensure children are receiving nutritious meals/snacks. Breakfast programs, lunch programs, and after-school meals/snacks are provided through contracted or provision of services.

1 = Almost Never 2 = Rarely 3 = Occasionally 4 = Frequently 5 = Almost Always NA = Not Applicable

1.	I establish procedures for the implementation and operation of the food service program.	1	2	3	4	5	NA
2.	I adhere to the legal requirements of the food service program, including local and national government guidelines.	1	2	3	4	5	NA
3.	I monitor the food service program and make adjustments as needed.	1	2	3	4	5	NA
4.	I ensure the management systems for tracking meals and inventories are in place and identify participant status.	1	2	3	4	5	NA
5.	I manage and control inventories and procurement.	1	2	3	4	5	NA
6.	I ensure compliance with required nutritional value.	1	2	3	4	5	NA
7.	I analyze the methods available for providing food service and identify and recommend the most beneficial methods for a given situation.	1	2	3	4	5	NA
8.	I work with nutrition and regulatory agencies relative to planning, conduct, and reporting of catering service programs within the school.	1	2	3	4	5	NA
9.	I ensure effective cash handling procedures and internal controls.	1	2	3	4	5	NA
Add up the circled numbers, divide the sum by 9, and enter the result here:		Food Service Skill Quotient: _____					