

Annual Goal Setting

Overview

One of the primary roles of a charter school board is working with the school leader to set, monitor, and evaluate performance against annual goals that are aligned with the school's long-term strategic vision. A school's annual goals reflect the unique approach and strategies it uses to ensure delivery on the promises articulated in its charter. Goals vary from year to year and depend upon student performance, school leadership, operations, and overall functioning of the board.

Too often, however, charter school boards and school leaders fail to set goals, only to become mired in day-to-day challenges. With no shared sense of direction, boards complete the school year not really knowing if they accomplished what they should have and how their work contributed to the overall success (or shortcomings) of the school.

This tool is designed to help charter school boards work with their school's leader to set annual goals. It includes:

- a framework for structuring the goal-setting process
- a timeline for implementing the goal-setting process
- an explanation of SMART goals
- two templates and one sample that boards can use and adapt to map their school's goals

Framework

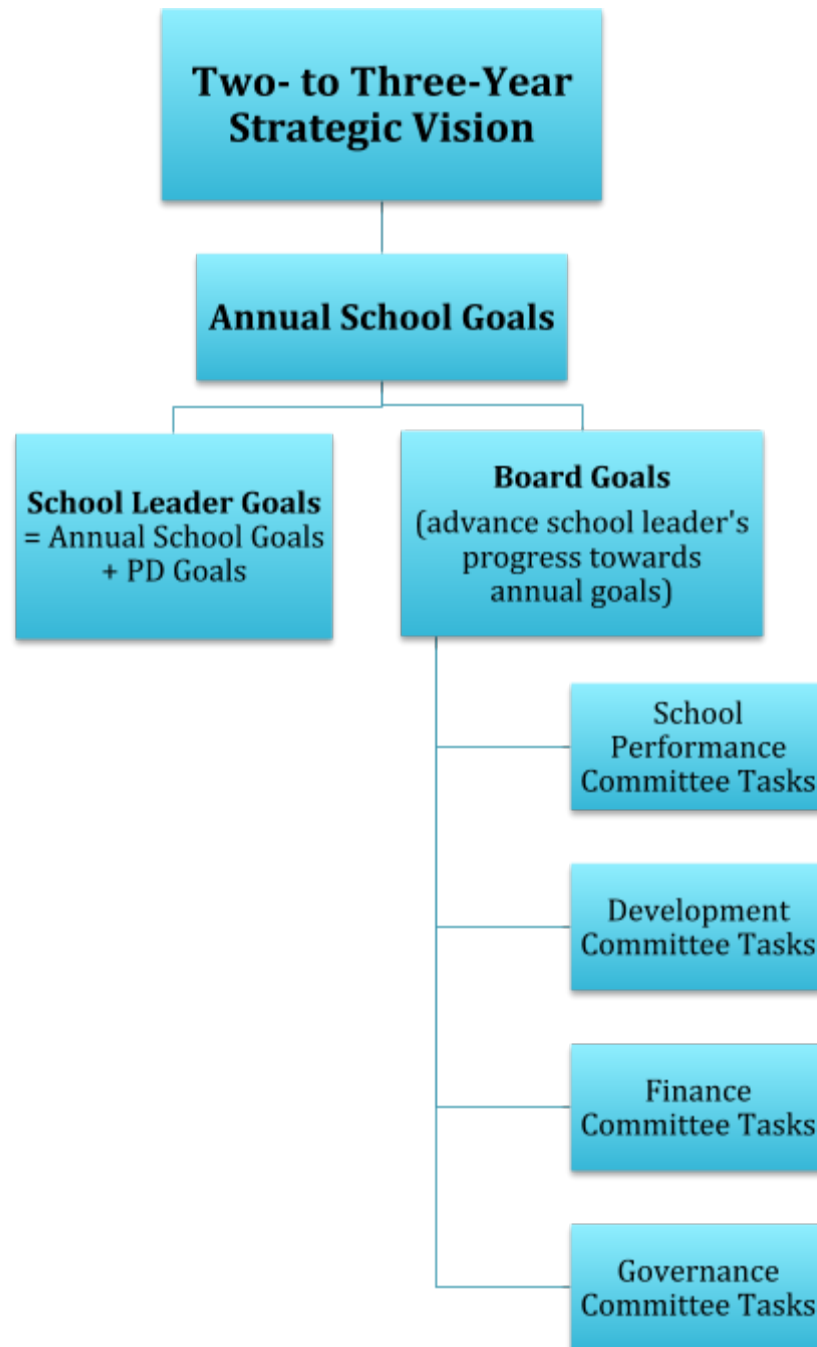
Detailed below is a framework for approaching the annual goal-setting process. Its primary assumptions are:

- The annual school goals are the goals that the school needs to achieve to make progress towards its two-to three year strategic plan.
- The school leader goals are the annual school goals + any professional development goals the school leader needs to achieve in order to achieve the school goals.
- The board goals are the goals the board needs to achieve in order to advance the annual school goals.
- Committees drive implementation of board goals. Each committee should be assigned one or more goals and be responsible for developing a detailed set of tasks—or an action plan—to make progress on these goals during the school year.
- Goals should define special aims and targets beyond the regular roles and responsibilities of the school leader and board.
 - The school leader's goals for the year should identify ambitious but realistic targets for improved academic performance, organizational performance, and fiscal wellbeing. The leader should also have professional development goals.
 - The board's goals for the year should align with the CBP Standards for Effective Charter School Governance and focus on enabling the school leader's work, strengthening the board's oversight capacity, and ensuring the long- and short-term viability of the organization.

This framework and its assumptions may or may not work for your school and its particular needs. Boards should work with their school leader to develop a goal-setting framework that is appropriate for their school.

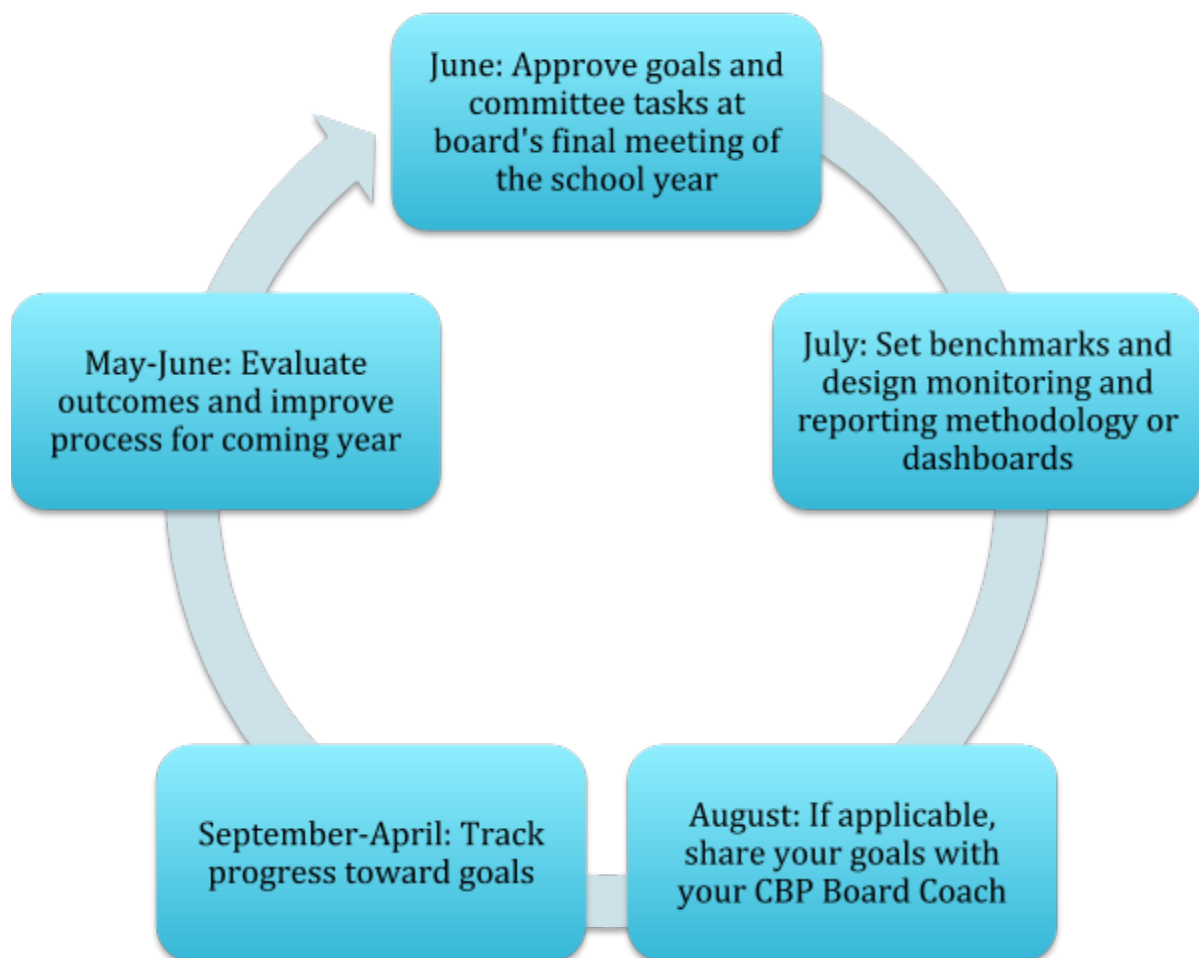
Outcome: High academic achievement for all students and organizational sustainability

Annual Goal Setting Framework



Timeline

Boards should work with their school leader to develop a perennial timeline for setting, monitoring, and evaluating annual goals. While this timeline will vary from school to school, the following model is common:



SMART Goals Defined

The annual goal-setting exercise is only as beneficial as the goals are sound and well written. The SMART system is a set of five criteria that boards can use to ensure each goal is clear and actionable. An explanation of each follows:

Specific

Goals should be clear and precise.

Questions to answer: What is the goal? Why does it exist? Who is responsible for achieving it? When is this goal to be met? Which specific tasks are needed to accomplish the outcome?

Measurable

Goals should specify criteria for evaluating accomplishment.

Questions to answer: How much? How many? How you will know it has been accomplished?

Attainable

Goals should be realistic, achievable, challenging, and aggressive.

Relevant

Goals should be aligned with the school's real needs and priorities.

Time-Bound

Goals should specify the time frame in which they are to be achieved.

Question to answer: When?

Above all else, remember to keep it simple. Goals are only helpful if they are useable!

Frequently Asked Questions

What if we don't have a strategic vision or plan?

It's ok—you have to start somewhere. Develop your annual goals now, and you can work on the strategic plan simultaneously or later. Use CBP's Strategic Planning tools for guidance if needed.

Who drafts each set of goals?

It depends. For most schools, the school leader prepares an initial draft of their goals and shares these with the board chair for input before sharing with the full board for feedback. In all cases, the board should develop its own goals and consult with the school leader as appropriate. Committees develop their own tasks and action plans to be approved by the full board.

How many goals should we have?

Typically, both the school leader and board set four to six goals each year.

What is the best time of year for goal setting?

The end of school year is ideal for most schools. Some schools, however, have found the beginning or middle of the school year to be most convenient, as goal setting can be informed by the results of the previous year's student performance assessments. Pick what works best for your school.

What's the difference between a goal and a task?

A goal is an outcome, whereas a task is an action step. A goal is an objective to be accomplished by a set of tasks.

How does the school leader evaluation fit into this?

The school leader evaluation should inform the goal-setting process. The school leader's annual goals should reflect his or her performance against the previous year's goals. For example, if the school leader only partially completes the goal of all fourth-grade students performing at or above grade level in reading, then

this goal will need to be revised and included among the coming year's goals.

What about Charter Board Partners' Board Effectiveness Diagnostic?

Charter Board Partners has a robust evaluation for boards. Through this process, called the Board Effectiveness Diagnostic, CBP works with boards and school leaders to identify governance strengths and weaknesses and make recommendations for improving board effectiveness. The findings of the CBP Board Effectiveness Diagnostic should inform annual goal setting, particularly the board goals.

Template & Sample

At the end of the goal-setting process, all stakeholders should be able to articulate the school's goals and identify their role in successful achievement of those goals. This exercise may also help boards assess whether they have the right number of board and committee members with the right skills to achieve the goals.

The following template provide options for articulating the school, board, and school leader goals. The template is meant to be a starting point; we encourage boards to create a framework that meets their charter school's unique needs.

Annual Goal Setting: Template

TWO- TO THREE-YEAR STRATEGIC VISION

ANNUAL SCHOOL GOALS

ANNUAL SCHOOL GOALS

1.

2.

3.

4.

5.

SMART GOALS: Specific. Measurable. Attainable. Relevant. Time-Bound.

ANNUAL SCHOOL LEADER GOALS

SCHOOL LEADER GOALS

1.

2.

3.

4.

5.

SMART GOALS: Specific. Measurable. Attainable. Relevant. Time-Bound.

ANNUAL BOARD GOALS

BOARD GOALS

1.

2.

3.

4.

5.

SMART GOALS: Specific. Measurable. Attainable. Relevant. Time-Bound.

SCHOOL PERFORMANCE COMMITTEE GOALS

SCHOOL PERFORMANCE COMMITTEE GOALS

1.

2.

3.

4.

5.

SMART GOALS: Specific. Measurable. Attainable. Relevant. Time-Bound.

GOVERNANCE COMMITTEE GOALS

GOVERNANCE COMMITTEE GOALS

1.

2.

3.

4.

5.

SMART GOALS: Specific. Measurable. Attainable. Relevant. Time-Bound.

FINANCE COMMITTEE GOALS

FINANCE COMMITTEE GOALS

1.

2.

3.

4.

5.

SMART GOALS: Specific. Measurable. Attainable. Relevant. Time-Bound.

DEVELOPMENT COMMITTEE GOALS

DEVELOPMENT COMMITTEE GOALS

1.

2.

3.

4.

5.

SMART GOALS: Specific. Measurable. Attainable. Relevant. Time-Bound.

Annual Goal Setting: Sample

Three-Year Strategic Vision

(To be realized by June 30, 2017)

XYZ Public Charter School will be among the highest performing public charter schools in the city with the financial and organizational capacity to expand to two additional campuses.

FY 15 Annual School Goals for XYZ Public Charter School

(To be reached by June 30, 2015)

1. The XYZ founding campus will rank among the top public schools in the city as measured by norm-referenced assessments.
 2. XYZ Public Charter School will meet or exceed its capital campaign target of \$2.1m.
 3. By April 15, XYZ Public Charter School will complete the English Language Arts and math curriculum for the fifth grade that will open in the fall of 2015.
 4. By May 15, 2015, XYZ will be operating with a balanced budget for FY 15 including three months of operating cash on hand (\$500k) and \$2m in cash reserves to fund future capital expenditures.
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FY 15 School Leader Goals

1. The XYZ founding campus will rank among the top 15% of public schools in the city as measured by norm-referenced assessments.
2. By June 30, XYZ Public Charter School will meet or exceed its capital campaign target of \$2.1m.
3. By April 15, XYZ Public Charter School will complete the English Language Arts and math curriculum for the fifth grade that will open in the fall of 2015.
4. By May 15, 2015, XYZ Public Charter School will be operating with a balanced budget for FY 15 including three months of operating cash on hand (\$500k) and \$2m in cash reserves to fund future capital expenditures.
5. By March 2015, complete a fundraising course to deepen capacity for managing large campaigns. Present summary of learning to the board at the June 2015 board retreat.

FY 15 Board Goals

1. By September 2014, the board will contribute to development of and approve the use an academic dashboard for high-level quarterly monitoring of student progress toward annual goals.
 2. By February 2015, board will work with the School leader to redesign the school leader evaluation instrument and procedure to better measure performance against academic goals.
 3. By December 31, 2014, 100% of board members will make an annual gift to the school and total board giving will increase by 80% over FY 14.
 4. By June 30, 2015, all board members serve on at least one committee and attend no fewer than 80% of board and committee meetings.
 5. The effectiveness of XYZ Public Charter School's Board will be increased by 10% as measured by Charter Board Partners' Board Effectiveness diagnostic.
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Committee Goals (To be reached by June 30, 2015)	Committee Members
SCHOOL PERFORMANCE COMMITTEE	
<ul style="list-style-type: none"> Monitor student achievement on school-wide interim assessments at least quarterly using an academic dashboard that has been created to support both school and board leaders in understanding progress. 	Members 1-3
<ul style="list-style-type: none"> By September 2014, create system for monitoring impact and cost of major interventions to monitor whether they are yielding intended results. 	School leader and principals A, B, C
<ul style="list-style-type: none"> Within one month of new members joining the XYZ Public Charter School board, provide onboarding session for each new board member on our student achievement goals, metrics, and education landscape to ensure they have the knowledge they need to understand school data and make effective board-level decisions. 	School Leader and committee chair
GOVERNANCE COMMITTEE	
<ul style="list-style-type: none"> Create board member and chair succession plan by January 2015 in anticipation of board turnover in September 2016. 	Members 4-6
<ul style="list-style-type: none"> Execute board evaluation by May 2015 to measure progress toward Standards for Highly Effective Charter School Board Governance. 	Governance committee chair
<ul style="list-style-type: none"> By June 2015, three of four standing committees are rated highly effective as measured by the board self-assessment and an evaluation of the committee minutes. 	Members 4-6
DEVELOPMENT COMMITTEE	
<ul style="list-style-type: none"> By December 2014, expand database of potential donors by 100% by mining board member networks and identifying priority list of prospects. 	Members 7-9
<ul style="list-style-type: none"> By June 2015, board members solicit individual donations strategically and effectively for the capital campaign, yielding \$200,000 allocated for the new gym. 	Members 7-9
<ul style="list-style-type: none"> By October 2014, provide effective board-wide development training so board has the skills, 	Members 7-9 Development Director

talking points, and confidence it needs to raise \$2.2m over three years.

School Leader

FINANCE COMMITTEE

- Monitor ongoing financial health of XYZ Public Charter School monthly.

Members 10-12
School CFO
School Leader

- By February 2015, complete legal audit to ensure XYZ Public Charter School is in compliance with all local and federal regulations.

Members 10-12
School CFO
School Leader

- Oversee annual clean audits to ensure XYZ Public Charter School is in a strong financial position on a yearly basis.

Members 10-12
School CFO
School Leader