



Name of President: \_\_\_\_\_ System: \_\_\_\_\_

Name of Board Chair: \_\_\_\_\_ School Year: \_\_\_\_\_

	✓					
15. If applicable: Ensures, with the principal(s), that the interview process for all staff is undertaken according to policies for all Catholic schools and reflects attention to requirements for documentation.		1	2	3	4	5
16. If applicable: Employs, supervises, evaluates and retains, in collaboration with the principal(s), selected non-professional staff.		1	2	3	4	5
Student Affairs	✓					
17. Ensures that policies, inclusive of policies for all Catholic schools are promulgated and implemented concerning student affairs.		1	2	3	4	5
18. Ensures the overall quality of the student affairs programming through the principal(s) and other applicable administrator(s).		1	2	3	4	5
19. Attends school or school-sponsored events in conjunction with the administrative team.		1	2	3	4	5
20. If applicable: Participates in hiring and retaining of all activity advisors and athletic staff. If applicable: Participates in hiring and retaining of all activity advisors and athletic staff through principal(s) and athletic director.		1	2	3	4	5
21. If applicable: Supervises the athletic director and implementation of the interscholastic athletic program.		1	2	3	4	5
22. If applicable: Provides leadership at the secondary level for, or oversees through the Academic Dean or Dean of Discipline:						
a. Assignment of all personnel to supervisory duties.		1	2	3	4	5
b. Planning and coordination of extracurricular activities.		1	2	3	4	5
c. Student discipline and decorum.		1	2	3	4	5
d. Annual update of student, faculty/staff and parent handbooks in conjunction with the Administrative Team and faculty.		1	2	3	4	5
e. Maintenance of student disciplinary and attendance records.		1	2	3	4	5
f. Development of the school calendar in accordance with policies for all Catholic schools and state regulations.		1	2	3	4	5
23. If applicable: Assumes responsibility for all necessary functions and operations related to management of student affairs at the secondary level.		1	2	3	4	5
<i>President's Comments with date noted:</i>						
<i>Board Chair's Comments with date noted:</i>						

<b>OPERATIONAL VITALITY</b>						
Institutional Advancement/Development Affairs	✓					
24. Leads a comprehensive plan and program to market the school system for image, enrollment and resources.		1	2	3	4	5
25. Employs, supervises, evaluates and retains all advancement staff.		1	2	3	4	5
26. Ensures that school system and policies for all Catholic schools are promulgated and implemented concerning advancement/development affairs.		1	2	3	4	5
27. Serves as chief public relations officer and spokesperson for the school system and ensures appropriate communication with various publics including media relations.		1	2	3	4	5

Name of President: \_\_\_\_\_ System: \_\_\_\_\_

Name of Board Chair: \_\_\_\_\_ School Year: \_\_\_\_\_

	✓					
28. Reviews, approves and submits for approval as necessary all fundraising and development/advancement initiatives and activities.		1	2	3	4	5
29. Participates in the cultivation of major donors and solicitation of major gifts for the school system.		1	2	3	4	5
30. If applicable: Ensures with the advancement staff the coordination of fundraising and development/advancement initiatives and activities.		1	2	3	4	5
31. Through the advancement staff, enrollment management staff, principals and/or board committees and subcommittees:						
a. Coordinates fundraising events.		1	2	3	4	5
b. Coordinates annual and deferred giving programs.		1	2	3	4	5
c. Coordinates marketing programs for image and enrollment through the comprehensive communications and marketing plan.		1	2	3	4	5
d. Coordinates the overall enrollment management plan and program including student recruitment, admissions and retention.		1	2	3	4	5
e. Remains informed as to all decisions regarding the acceptance or decline of admittance to students, as well as reasons for student withdrawals or dismissals.		1	2	3	4	5
f. Ensures good relations and involvement with the alumni/ae community.		1	2	3	4	5
g. Ensures appropriate communications with partner Catholic elementary schools and parishes.		1	2	3	4	5
Business Affairs	✓					
32. Provides overall leadership for responsible stewardship and appropriate reporting of school system finances to the Board of Members, Board of Directors, government agencies and the school system's constituents.		1	2	3	4	5
33. Employs, supervises, evaluates and retains the system finance personnel.		1	2	3	4	5
34. Involves the principal/building administrators and other applicable system administrators in the annual budget development process.		1	2	3	4	5
35. Ensures participation of appropriate personnel in quarterly reviews of individual school/campus budget versus year-to-date actuals.		1	2	3	4	5
36. Through finance personnel and/or appropriate administrators:						
a. Oversees the preparation, monitoring and reporting of the annual school budget.		1	2	3	4	5
b. Manages the day-to-day financial operations of the system including accounts payable, accounts receivable, tuition collection, financial aid, etc.		1	2	3	4	5
c. Coordinates all financial investments in consultation with the Finance Committee of the Board of Directors.		1	2	3	4	5
d. Oversees hiring and dismissing of selected non-instructional (support) staff.		1	2	3	4	5
e. Ensures appropriate supervision of selected non-instructional (support) staff.		1	2	3	4	5
f. Ensures that the system maintains a safe, secure and clean environment.		1	2	3	4	5
g. Provides oversight of system food service operations.		1	2	3	4	5
h. Provides oversight of student transportation services.		1	2	3	4	5
37. Ensures that policies, inclusive of policies for all Catholic schools, are promulgated and implemented concerning business affairs.		1	2	3	4	5
38. In conjunction with the board, assists in formulating, reviewing and executing all local school system policies and regulations related to the business affairs of the school system.		1	2	3	4	5
39. Ensures compliance with board, school system, government and policies for all Catholic schools concerning financial stewardship.		1	2	3	4	5
40. Handles legal affairs in conjunction with the Diocese.		1	2	3	4	5

Name of President: \_\_\_\_\_ System: \_\_\_\_\_

Name of Board Chair: \_\_\_\_\_ School Year: \_\_\_\_\_

*President's Comments with date noted:*

*Board Chair's Comments with date noted:*

<b>GOVERNANCE AND LEADERSHIP</b>						
Board Relations	✓					
41. Serves as administrative officer to the Board of Directors, facilitating communication and providing professional leadership.		1	2	3	4	5
42. Serves as liaison between the school system communities and the Board of Directors.		1	2	3	4	5
43. Serves as liaison between the Board of Directors and the Diocese.		1	2	3	4	5
44. Ensures, in collaboration with the Superintendent of Catholic Schools, that board pre-service and in-service training is conducted on normative areas of governance responsibility.		1	2	3	4	5
45. Coordinates with the board a process for long-range strategic planning:						
a. Ensures the implementation of strategic plans and other plans as required by the Board of Directors, the state, the Diocese and the regional accrediting agency, etc.		1	2	3	4	5
b. Ensures regular reporting of all plans and progress to the various constituencies of the school system.		1	2	3	4	5
c. Leads specific planning for finances, advancement/development, enrollment management and communication.		1	2	3	4	5
46. Works with the Board of Directors in formulating school and/or system policy and supervises implementation of board policy in the school system.		1	2	3	4	5
47. Maintains a collaborative relationship with the Board of Directors and meets regularly with the Chairperson of the Board of Directors and the Executive Committee to ensure effective board functioning and operations.		1	2	3	4	5
48. Provides requested reports and information and attends semi-annual and annual meetings of the Board of Members with the Chairperson of the Board of Directors.		1	2	3	4	5
49. If applicable: Coordinates with the Episcopal Vicar (or designee) for matters related to the effective functioning of the Committee of Pastors.		1	2	3	4	5
Liaisons and Other Responsibilities	✓					
50. Plans and conducts regular meetings of an administrative team, an advancement team and other necessary team meetings.		1	2	3	4	5
51. Serves as the chief representative of the system to the area parishes, schools and pastors.		1	2	3	4	5
52. Works with the Superintendent of Catholic Schools (or designee) as appropriate on issues of policy, planning, evaluation and development.		1	2	3	4	5
53. Serves as the chief representative of the system in dealings with the educational, civic and diocesan communities.		1	2	3	4	5
54. Responds to requests from the Bishop of the Diocese of Erie regarding information or status of the system.		1	2	3	4	5
55. Ensures the appropriate and effective representation and engagement of the school system in matters related to athletics and athletic programs.		1	2	3	4	5
56. Participates in an annual performance evaluation by and Board of Directors in consultation with the Superintendent of Catholic Schools.		1	2	3	4	5
57. If applicable: Ensures the conduct of a process for the updating and approval of all employee manuals.		1	2	3	4	5
58. Performs other duties as required by the Board of Directors.		1	2	3	4	5

Name of President: \_\_\_\_\_ System: \_\_\_\_\_

Name of Board Chair: \_\_\_\_\_ School Year: \_\_\_\_\_

<i>President's Comments with date noted:</i>
<i>Board Chair's Comments with date noted:</i>

<b>II. Self-Appraisal of General Performance Categories</b>	✓					
1. <b>Mission</b> (models: mission focus, faith, service, Catholic identity, integrity, trust, values, stewardship, morals/ethics, care for others – “walks-the-talk”)		1	2	3	4	5
2. <b>Communication</b> (communicates the vision, communicates consistently and clearly, seeks/provides feedback, makes a compelling case/reinforces the mission and vision, allows disagreement, leads effective meetings, listens actively, works with conflict, keeps supervisors informed)		1	2	3	4	5
3. <b>Judgment</b> (decisive, collaborative/involves others in decisions, applies learning from past experiences, uses facts and data, seeks continuous improvement)		1	2	3	4	5
4. <b>Flexibility</b> (manages, communicates and leads change; adaptable, creative, innovative, seeks new approaches)		1	2	3	4	5
5. <b>Leadership</b> (articulates the vision, upholds the mission; provides direction, initiative and expectations for high standards; accepts responsibility, empowers, motivates/inspires people, effectively and appropriately delegates responsibility/authority, develops performance, recognizes excellence)		1	2	3	4	5
6. <b>Interpersonal Skills</b> (cooperative, listener, team player, displays emotional intelligence, builds relationships, recognizes/builds talent in others, coaches/challenges others, knows own strengths and limitations, earns respect)		1	2	3	4	5
7. <b>Planning</b> (displays strategic thinking, defines clear goals, ensures follow-through and evaluation of plans, plans, prioritizes, assigns, budgets and reports effectively)		1	2	3	4	5
8. <b>Time Management</b> (productive, organized, goal/results-oriented, sets and meets deadlines, anticipates obstacles, manages stress, generates urgency in others)		1	2	3	4	5
9. <b>Learning Orientation</b> (lifelong learner, works on self-development, uses technical skills/knowledge in his/her field, develops, uses and models technology skills; learns from mistakes, motivates others to learn and improve)		1	2	3	4	5

<i>President's Comments with date noted:</i>
<i>Board Chair's Comments with date noted:</i>

President's Signature: \_\_\_\_\_ Date (mid-year): \_\_\_\_\_

Board Chair's Signature: \_\_\_\_\_ Date (mid-year): \_\_\_\_\_

President's Signature: \_\_\_\_\_ Date (end-of-year): \_\_\_\_\_

Board Chair's Signature: \_\_\_\_\_ Date (end-of-year): \_\_\_\_\_