

Planning and Evaluation

The planning and evaluation area of practice requires school business officials to have long-term insights, deft analytical skills, and managerial and leadership expertise. With sensitivity to their community's needs, they also engage with stakeholders and have strong communication skills. The functions in this area of practice include:

This profile guide is focused on the knowledge and skills required for:

- Strategic Planning
- Program Evaluation
- Community Engagement



This profile tool is to frame your reflection on your practice, based on the indicators for each area of the Planning and Evaluation practice standards. Additional indicators representative of your context, your practice and your plans for growth may be added.

A suggested approach for using this tool:

Evidence in Practice

Review each of the statements highlighting ones that represent practices you demonstrate.

Identify those practices you demonstrate in the "Evidence of Practice" column. (Are the practices observable? Are they measurable?)

If you currently demonstrate a practice that is not described, consider adding it to evidence in practice column.

Additional indicators that represent your context based on examples of practice shared in the "Evidence in Practice" column may also be added.

Areas for Growth

Reflect on your current practice and on the job behavior as they relate to the area of practice to assist you in identifying areas for growth.

You may choose to add additional indicators based on shared practices and/or emerging legislation and/or research that identify areas in which you would like to grow.

This tool is intended for your personal use. You may choose to share with mentors and/or colleagues as you see fit. It is also a good tool to use when identifying areas of experience and/or specific PD/CPD required in meeting or maintaining the CSBO designation. Individual members who wish to do a more in-depth assessment of their current skill levels, may wish to request a copy of the 2021 ASBO International School Business Management Professional Standards which provides further information for entry, mid and senior level competencies.

To download a copy of this practice profile, visit the ASBOA website - Areas of Practice - [Planning-and-evaluation/](#)



AREA OF PRACTICE Planning and Evaluation

STRATEGIC PLANNING

In this function, school business officials understand the strategic planning process and work with the board and senior leadership team. They know how to allocate funds to maximize resources that go into the classroom and understand education plans and the culture of the system. This function also includes soft skills in communication and team building- more than just knowing how to do things, it involves helping others learn too.

INDICATORS	EVIDENCE IN PRACTICE
<p>A school business official understands and demonstrates the ability to:</p> <ul style="list-style-type: none"> a) Assist in the development and communication of a vision of the preferred future of the school authority, drawing from current research and best practice. b) Assist in developing a strategic plan that will move the school authority toward the achievement of its mission and goals. c) Review the financial impact of strategic planning goals by analyzing and quantifying relevant data for optimal decision-making that leads to successful educational outcomes for the school authority. d) Assist with the implementation, monitoring, evaluating, reporting and revision of the strategic plan. 	
	<p style="text-align: center;">AREAS FOR GROWTH</p>

AREA OF PRACTICE

Planning and Evaluation

PROGRAM EVALUATION

In this function, the school business official's role is to understand costs and how these match overall system outcomes. They make plans to cost instructional programs and identify measurements for tracking them.

INDICATORS	EVIDENCE IN PRACTICE
<p>A school business official understands and demonstrates the ability to:</p> <ul style="list-style-type: none"> a) Collaborate with stakeholders and establish strong working relationships to understand the teaching and learning program structures and needs. b) Use financial data to evaluate programs and services for relevancy, effectiveness and efficiency to determine if program outcomes have met desired objectives. c) Identify and analyze the various economic factors associated with the delivery and evaluation. d) Managing change when evaluation determines it is necessary. 	
	AREAS FOR GROWTH

AREA OF PRACTICE

Planning and Evaluation

COMMUNITY ENGAGEMENT

In the community engagement function, school business officials engage with the community on issues that affect it. However, they also proactively listen to and engage parents and the community as a whole to understand its position on issues.

INDICATORS	EVIDENCE IN PRACTICE
<p>A school business official understands and demonstrates the ability to:</p> <ul style="list-style-type: none"> a) Understand and develop relationships with stakeholders to create strategic alliances in the community. b) Manage and assist in a comprehensive system to target broad community engagement. c) Develop plans to review and analyze stakeholder perspective into strategic directions. d) Communicate results, findings, actions arising from community engagement sessions. e) Understand and competently navigate the political environment at all levels. 	
	<p style="text-align: center;">AREAS FOR GROWTH</p>