

Developing an Annual Board Activity Calendar

Benefits of an annual calendar

The annual board activity calendar can form the cornerstone for the formulation of each board meeting agenda. It ensures that all key board responsibilities are accomplished in a timely fashion within the year. In addition, establishing an annual board activity calendar:

- Streamlines monthly agenda planning
- Ensures all legally required actions are addressed at the appropriate time
- Ensures time is allotted for policy, planning, and evaluation in addition to routine and hot issues that arise
- Ensures all team members know when specific items will be addressed
- Assists new trustees and the public in understanding the cycle of district business and the board's appropriate role
- Ensures that items deferred for future consideration are not forgotten

Developing the calendar

Consider the following categories when scheduling events or agenda items on your calendar:

Required board actions, such as:

- Items legally requiring board action in a specific month (e.g. budget adoption)
- Items legally requiring action annually but not at a specific time (e.g. superintendent evaluation)
- Items required by local board policy (e.g. the review of district vision and mission)

Desired board actions, such as:

- Progress and results reports on goals and plans
- Reports on curriculum or teaching programs
- Reports on effectiveness or efficiency of district operations, e.g. student discipline and facilities maintenance.
- Policy reviews

Activities not related to board meetings, such as:

- District activities and events
- Major campus events
- Meetings of district-related organizations
- Board training opportunities
- Area school board association meetings and workshops
- Business meetings of local governmental agencies
- Committee meetings
- Advisory group meetings

Refining the draft calendar

Once the board and superintendent have developed a draft calendar, the following questions can be used to check that all activities are scheduled at appropriate times in relation to each other and the calendar is a workable one.

- Have we placed required board actions in the months that action is legally required to take place?
- Have we left out any actions that are legally required annually but not required to take place in a specific month? If so, when do we currently conduct this activity?
- Have we left out any actions that are required by our local district policy? If so, when do we currently conduct these activities?
- Are there other issues the board wishes to address this year that we have not already placed on the calendar? If so, given the items already placed on the calendar, when does it make sense to schedule these?
- What activities or events apart from regular board meetings do we need to place on the calendar because the board would like to participate or is expected to attend?
- Given the sequence of activities and events we have scheduled on the draft calendar, are there any items that could be accomplished more effectively or efficiently if moved to a different month? (For example, adopting district goals after reviewing the district AEIS report but before preparing the district budget.)
- Given the number of activities or events listed for each month, are there activities that would be more effectively or efficiently accomplished in a month with fewer scheduled activities?

Practice drafting a calendar

The blank activity calendar worksheet on the following pages can be used to list board tasks conducted annually related to several different areas, identified in the left column. Use the worksheet and the following questions to draft a calendar for review by the board-superintendent team.

- 1) What tasks need to be placed in the first four categories? (Planning and evaluation, personnel, budget, and team development)
- 2) After scheduling essential activities for the first four categories, when would be the best month to schedule time for a review of selected policies?
- 3) What other kinds of tasks in other areas might need to be added?
- 4) What other district and/or board-related events might be useful to add to this calendar?

Board Activity Calendar Worksheet

	SEPT	OCT	NOV	DEC
Planning & Evaluation				
Personnel				
Budget				
Team Development				
Policy				
Other				
District Events				
Other Board Related Events	TASA/TASB Convention			

	JAN	FEB	MAR	APR
Planning & Evaluation				
Personnel				
Budget				
Team Development				
Policy				
Other				
District Events				
Other Board Related Events		TASB Winter Governance and Legal Seminar		

	MAY	JUN	JUL	AUG
Planning & Evaluation				
Personnel				
Budget				
Team Development				
Policy				
Other				
District Events				
Other Board Related Events		TASB Summer Leadership Institute		