



COLLIER COUNTY PUBLIC SCHOOLS

**Sandra Eaton, Chief of Staff**  
**August 13, 2025**

# **Collier County School Board 2024-2025 Self-Evaluation**

# School Board Self-Evaluation Framework SY 2024-2025

## BELIEF STATEMENT

A board self-evaluation is an indication of good governance and helps the board understand how it is performing in fulfilling its mission, vision, and priorities.

## PURPOSE

To assess the performance of the board regarding the following areas of competency:

- Governance/Policy
- Board/Superintendent Relationship
- Vision/Mission/Priorities
- Budget/Finance
- Board Chair Leadership
- Individual Professionalism



## PROCEDURES

School Board members will consider the board's attainment of each competency [1-4] and rate each performance indicator on the evaluation using the ratings and values described below. Board members will also rate the performance of the Board Chair [competency 5] and their own individual professionalism [competency 6]. The annual self-evaluation will be completed in June of each year.

If a score of 1 or 2 is assigned, the board member must provide a rationale for the score and a suggestion for improvement.

- **Highly Effective (4):** Performance exceeds the criteria. Evidence and observation demonstrates the board's exemplary performance. The board has consistently had a positive impact on board operations and meeting the mission, vision, and priorities.
- **Effective (3):** Performance meets the criteria. Evidence and observation demonstrates the board's effective performance. The board has satisfactorily met the criteria and has shown an improvement in board operations and meeting the mission, vision, and priorities.
- **Developing (2):** Performance is inconsistent and partially meets criteria. Evidence and observation demonstrates that the board's performance has made moderate gains, or maintained the status quo, in board operations and meeting the mission, vision, and priorities.
- **Unsatisfactory (1):** Performance does not meet the criteria and requires significant improvement. Evidence and observation demonstrates the board has not met the performance criteria and has had a negative impact on board operations and/or meeting the mission, vision, and priorities.

## COMPETENCY 1: GOVERNANCE/POLICY

PERFORMANCE INDICATORS		HIGHLY EFFECTIVE (4)	EFFECTIVE (3)	DEVELOPING (2)	UNSATISFACTORY (1)
1.1	All board members are routinely familiar with the agenda materials and are ready to discuss and decide important items.	Rutherford Moshier	Lucarelli Carter Mason		
1.2	Once a decision has been made, all members respect and support the decision, and the board speaks with one voice.	Lucarelli Rutherford Moshier	Carter Mason		
1.3	Board members do not attempt to individually speak on behalf of the board or commit the board.	Rutherford Carter Moshier Mason	Lucarelli		

# COMPETENCY 1: GOVERNANCE/POLICY

PERFORMANCE INDICATORS		HIGHLY EFFECTIVE (4)	EFFECTIVE (3)	DEVELOPING (2)	UNSATISFACTORY (1)
1.4	Board members hold confidential items in confidence.	Rutherford Carter Moshier Mason	Lucarelli		
1.5	Our board utilizes an ongoing system to develop, review, and update policies needed for the operation of the district.	Lucarelli Rutherford Moshier Mason	Carter		
1.6	The board refrains from committing to a position on an issue before all relevant facts are present.	Rutherford Carter Moshier	Lucarelli Mason		

**COMPETENCY SCORE: 3.66**

**Comment**

**Kelly Mason:** There have been a lot of improvements in this area.

## COMPETENCY 2: BOARD/SUPERINTENDENT RELATIONSHIP

PERFORMANCE INDICATORS		HIGHLY EFFECTIVE (4)	EFFECTIVE (3)	PROGRESSING (2)	UNSATISFACTORY (1)
2.1	The board and superintendent respect and trust one another.	Lucarelli Rutherford Carter Moshier Mason			
2.2	Individual board members follow Board bylaws and policies.	Rutherford Carter Moshier Mason	Lucarelli		
2.3	The board recognizes the superintendent as chief executive officer and educational leader of the district.	Lucarelli Rutherford Carter Moshier Mason			

**COMPETENCY SCORE: 3.93**

**Comments**

**Kelly Mason:** I do think there has ben improvement in this area as well. I think the entire board better understands the role of the superintendent and the value she brings to the district.

## COMPETENCY 3: VISION/MISSION/PRIORITIES

PERFORMANCE INDICATORS		HIGHLY EFFECTIVE (4)	EFFECTIVE (3)	PROGRESSING (2)	UNSATISFACTORY (1)
3.1	Discussions and decisions regarding major items before the board routinely includes consideration of their impact on meeting the board’s mission, vision, and priorities.	Lucarelli Rutherford Carter Moshier Mason			
3.2	The board emphasizes setting and monitoring priorities.	Lucarelli Rutherford Carter Moshier Mason			

## COMPETENCY 3: VISION/MISSION/PRIORITIES

PERFORMANCE INDICATORS		HIGHLY EFFECTIVE (4)	EFFECTIVE (3)	PROGRESSING (2)	UNSATISFACTORY (1)
3.3	The board weighs all decisions based on alignment to the board’s priorities and in terms of what is best for students and staff.	Rutherford Carter Moshier Mason	Lucarelli		
3.4	The board collectively establishes and advocates a legislative platform that positively affects student outcomes and the work of the district.	Lucarelli Rutherford Carter Moshier Mason			

**COMPETENCY SCORE: 3.95**

### Comments

**Kelly Mason:** Our board revisited our priorities after two years to ensure we were on track. I do think we have stayed focused with our mission and vision.



## COMPETENCY 4: BUDGET/FINANCE

PERFORMANCE INDICATORS		HIGHLY EFFECTIVE (4)	EFFECTIVE (3)	PROGRESSING (2)	UNSATISFACTORY (1)
4.1	The budget reflects the board’s vision, mission, and priorities and supports the district’s goals and objectives for student achievement.	Lucarelli Rutherford Carter Moshier Mason			
4.2	The board requires proper accountability for the expenditure of school district funds.	Lucarelli Rutherford Carter Moshier Mason			
4.3	The board stays aware of its debt limitations, sets priorities based on the total financial needs of the system, and maintains an adequate financial reserve.	Lucarelli Rutherford Carter Moshier Mason			
<b>COMPETENCY SCORE: 4.0</b>					

**Comments**

**Kelly Mason:** Fiscal responsibility is one of our priorities, and we have been proactive and worked with staff to ensure our tax-dollars and resources are closest to the classrooms.

## COMPETENCY 5: BOARD CHAIR LEADERSHIP

PERFORMANCE INDICATORS		HIGHLY EFFECTIVE (4)	EFFECTIVE (3)	PROGRESSING (2)	UNSATISFACTORY (1)
5.1	The Board Chair effectively manages meetings in an efficient, productive manner and ensures discussion is relevant to the agenda.	Lucarelli Rutherford Carter Mason	Moshier		
5.2	During board meetings, the Board Chair encourages participation by each board member.	Lucarelli Rutherford Carter Moshier Mason			

**COMPETENCY SCORE: 3.9**

### Comments

**Kelly Mason:** As the board chair for the last 2 and a half years, I ensure all board members have a chance to speak before I voice my thoughts and opinions. It has been an honor and privilege to serve as the chair.

## COMPETENCY 6: INDIVIDUAL PROFESSIONALISM

PERFORMANCE INDICATORS		HIGHLY EFFECTIVE (4)	EFFECTIVE (3)	PROGRESSING (2)	UNSATISFACTORY (1)
6.1	I come to meetings prepared to focus on discussion issues and keep my comments relevant and brief.	Lucarelli Rutherford Carter Moshier Mason			
6.2	I can disagree with other board members on matters and still maintain an attitude of mutual respect and trust.	Lucarelli Rutherford Carter Moshier Mason			
6.3	I hold confidential items in confidence.	Lucarelli Rutherford Carter Moshier Mason			
6.4	I actively promote the school district to the public.	Lucarelli Rutherford Carter Moshier Mason			

## COMPETENCY 6: INDIVIDUAL PROFESSIONALISM

PERFORMANCE INDICATORS		HIGHLY EFFECTIVE (4)	EFFECTIVE (3)	PROGRESSING (2)	UNSATISFACTORY (1)
6.5	I understand and respect the distinction between the board’s responsibilities and the superintendent’s duties.	Lucarelli Rutherford Carter Moshier Mason			
6.6	I adhere to Board bylaws and policies.	Lucarelli Rutherford Carter Moshier Mason			
6.7	I direct complaints and requests to the superintendent rather than attempting to solve them directly.	Rutherford Carter Moshier Mason	Lucarelli		
6.8	I understand the basic principles of school finance, including state, federal, and local sources of revenue.	Lucarelli Carter Moshier Mason	Rutherford		

COMPETENCY SCORE: 3.95

# Summary/Overall Performance

Competency	Average Score (4.0 scale)
Competency 1: Governance/Policy	3.66
Competency 2: Board/Superintendent Relationship	3.93
Competency 3: Vision/Mission/Priorities	3.95
Competency 4: Budget/Finance	4.0
Competency 5: Board Chair Leadership	3.9
Competency 6: Individual Professionalism	3.95
<b>OVERALL SCORE: 3.89</b>	

2023-2024 Total Average Score: 3.71



## General Comments

**Lucarelli:** “Overall, I think this board has been doing a great job. As far as suggestions for improvement, if board members can refrain from pushing personal and political agenda, we'll be even better. “

**Rutherford:** “I believe the Board and Superintendent has worked together wonderfully well. I am glad to be a part of the team.”

**Carter:** “The chair does a good job keeping us on task and allowing open conversations. There is a better understanding of process and procedures of the meetings by the newest members. “

**Moshier:** "As a school member I believe that we work well together and with the superintendent.”

**Mason:** “I think there have been many improvements by this board as a whole. My only suggestion is that the board members take a more active role in the community by sharing the positives from our district as well as areas for growth. Ultimately, we need to do a better job dispelling myths and sharing factual information and data. I am proud of the work we are all doing as a team and know we will continue to put our students first.”





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