

Task	Frequency	Due Date	Responsible Party	Formal Board Action?
Brown Act and Conflict of Interest Training	Annually	Board Retreat	Governance Committee	No
Form 700 Filings	Annually and as needed	4/1	Governance Committee	No
Statement of Information Filing (Sec. of State)	Biennial	Even Years by 7/31	Governance Committee	No
School Safety Plan	Annually	3/1	Management	Yes
LCAP	Quarterly	6/30	Management	Yes
WASC Update	Annually		Management	No
Enrollment and Attendance review	Quarterly		Management	No
Establish Annual Organizational Goals	Annually	Board Retreat	Management	Yes
Budget	Annually	6/30	Management	Yes
Unaudited Actuals	Annually	9/15	Management	Yes
First Interim Report	Annually	12/15	Management	Yes
Second Interim	Annually	3/15	Management	Yes
Financial Statement Review	Monthly		Management	No
Auditor Selection	Annually		Finance Committee	Yes
Audit Approval	Annually	12/15	Board	Yes
990 Filing	Annually	11/15	Finance Committee	No
Review of Bylaws	Annually	Board Retreat	Governance Committee	No
Review of Board Terms	Annually	Board Retreat	Governance Committee	No
Trustee Assessments	Annually		Governance Committee	No
Evaluation of Board Effectiveness	Annually		Governance Committee	No
Evaluation of Meeting Effectiveness	Monthly		Governance Committee	No
Board Succession Planning	Quarterly		Governance Committee	No
CEO Evaluation	Annually	5/1	CEO Eval Committee	Yes
Review Board Job Description and Service Agreement	Annually	Board Retreat	Governance Committee	Yes
Board Retreat	Annually	July	Governance Committee	No
Board Reorganization (officers and committees)	Annually	Board Retreat	Board	Yes
New Trustee Orientation	As needed		Governance Committee	No
Review of the Trustee Training Plan	Annually		Governance Committee	No
Review of the Board Handbook	Annually		Governance Committee	No