Miami-Dade County Public Schools
Evaluation Procedures

The Office of Labor Relations has the responsibility of negotiating labor contracts with certified bargaining agents. Currently, employees in the following unions are formally evaluated: The United Teachers of Dade (UTD) – teachers and clerical employees and Dade County Schools Administrators' Association (DCSAA) – professional and technical employees. Additionally, employees in the following employee groups are also evaluated: Managerial Exempt Personnel (MEP) – principals, assistant principals, Region and District Administrators and Confidential Exempt Personnel (CEP) – high level clerical employees who have access to confidential material and information.

The process of evaluating employees is ongoing and the instruments used in the evaluation process are modified and revised by the parties when necessary. Each time a contract is up for bargaining, the provisions of the evaluation tool may be subject to collective bargaining. Once the agreements are agreed upon, the negotiated contracts are distributed to all members of the bargaining unit. The evaluation and contract documents are also uploaded onto the District website for computer access.

United Teachers of Dade

2008 – Instructional Performance Evaluation and Growth System (IPEGS)
A new evaluation tool for instructional personnel was adopted in 2008 for implementation. IPEGS utilizes the Goals and Roles Assessment Evaluation Model developed by Dr. James Strong. The foundation of IPEGS is based on eight performance standards and indicators. IPEGS is currently being used to assess the performance of instructional personnel.

IPEGS is being revised to comply with new statutory compliance requirements of Senate Bill 736.

Dade County School Administrator's Association – Professional and Technical Personnel
Employees in this bargaining unit are evaluated using required forms. The process begins with a planning phase which must be developed on or before September 30 of the fiscal year. A planning form is completed in a conference and a written plan is signed and agreed upon by the employee and the evaluator. A mid-year progress conference is conducted to monitor progress towards goals and objectives. At the end of the fiscal year an evaluation conference is conducted to review employee performance throughout the year.

The current DCSAA evaluation form being used has not been modified within the past contractual period.

Managerial Exempt Personnel – Performance Management Assessment for Administrators – This evaluation tool consists of three phases: a Planning Phase – during this phase the assessee and the assessor must agree on key performance targets, professional growth targets, and administrative competencies; a Mid-year Assessment Status – during this phase the assessee and the assessor meet to determine if the assessee is on target to meet expected outcomes or if additional assistance is required; the third phase is the End of Year Overall Assessment – during this phase each component of the tool is weighted to calculate an overall rating of Substantially Exceeds Standards, Exceeds Standards, Meet Standards or Does Not Meet Standards.

A new MEP administrative evaluation tool is being developed to comply with the requirements of Senate Bill 736 for principal evaluations which incorporates student achievement.

Confidential Exempt Personnel (CEP) – Exempt/Confidential Personnel Evaluation
Employees in this group have a single assessment of their performance. The document is completed once a year. There are four ratings for each performance area; These areas are combines to calculate an overall rating of exemplary, above expectation, meets expectation or below expectation.

ARTICLE XIII - EVALUATION

Evaluation is a decision made by comparing observation data to an established standard. This comparison reflects the extent to which employees meet performance expectations and is used to make employment decisions. Each year, the principal or supervising administrator designated by the principal must observe all teachers regardless of their contract status. The purpose of these observations is to formulate an annual evaluation decision that is recorded on the annual evaluation form. Evaluation is a statutory responsibility of the principal.

Section 8. Instructional Performance Evaluation and Growth System (IPEGS) Pilot Program Design Teams

M-DCPS and UTD identified representatives to serve on a joint committee. Three design teams representing differentiated personnel categories were established. Members were determined by both M-DCPS and UTD. The three categories were: classroom teachers, student services personnel (i.e., school psychologists, guidance counselors, social workers, etc), and instructional support personnel (curriculum support specialists, media specialists, teachers on special assignment. The design team members adopted a consensus building approach in completing their design work.

Definitions:

Performance Indicators: Tools for measuring achievement which clearly identify the needs of students and specifically state what is to be achieved in relationship to needs.

Performance Standards: A statement of the general guidelines and criteria that will be used in evaluating teachers and the techniques utilized in achieving measurable results.

Rubrics: Rubrics will bridge the gap between standards and assessment. They yield summative and formative data which will be used to define performance levels. A rubric depicting a continuum of effectiveness is tailored to each of the performance standards in a five level system. The levels are: exemplary, superior, proficient, developing and unsatisfactory.
Observation: Annual contract employees will have a minimum of two observations a year. Professional Service and continuing contract personnel will have at least one observation a year. An Observation must last a minimum of 20 minutes.

Goal Setting: Instructional Personnel document benchmarks established at the beginning of the year set forth to build on strengths, address weaknesses, and document gains at the end of the year.

Documentation Logs: Record of evidence indicating whether performance standards related to specific student achievement have been met by the teacher.

IPEGS Pilot Program

Thirty two (32) schools will be selected collaboratively by M-DCPS/UTD to participate in a one

year pilot program of the new Instructional Performance Evaluation and Growth System.
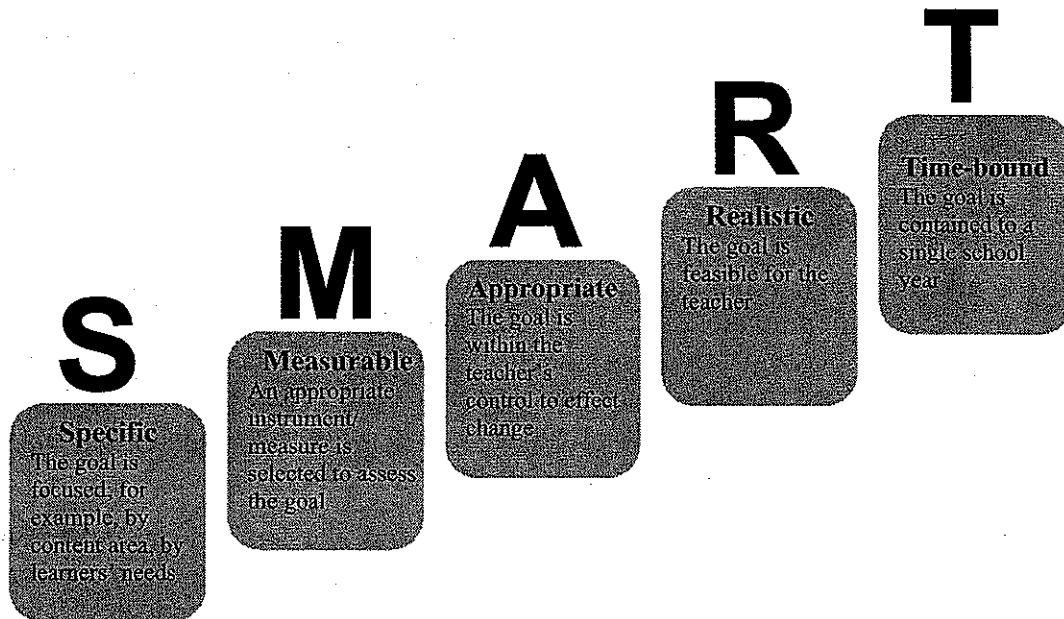
- The staff and administration of the pilot schools will be provided on-going training on the new tool by the Office of Professional Development in conjunction with the consulting firm.

- The pilot IPEGS will begin implementation in the 2006-2007 school year.

- Professional educators in the pilot schools will be evaluated on seven or eight performance standards.

  1. Knowledge of Learners
  2. Instructional Planning
  3. Instructional Delivery and Engagement
  4. Assessment
  5. Learner Progress
  6. Communication
  7. Professionalism
  8. Learning Environment

- A five level rubric will be used to assess how well the performance standards are performed by the teachers who are evaluated. The five levels in the rating system are:

  1. Exemplary – teacher optimizes learning and is highly effective
  2. Superior – teacher promotes learning and uses a variety of approaches
  3. Proficient – teacher demonstrates content area knowledge and engages learners in
      appropriate strategies
  4. Developing – teacher attempts to use a variety of appropriate strategies but often
      is ineffective
  5. Unsatisfactory – teacher lacks knowledge and does not academically engage
      learners

The staff and administration from the thirty-two (32) pilot schools will provide feedback on the 2006-2007 implementation of IPEGS at the individual school sites. The data will be compiled and analyzed by the joint M-DCPS/UTD Evaluation Committee. The Committee shall make recommendations. The parties shall collaboratively amend/modify IPEGS. These modifications and amendments will be made prior to the 2007-2008 school year.

In the 2007-2008 school year, the second implementation phase will include additional schools selected to participate in the IPEGS. During the 2007-2008 school year, the data will be compiled and analyzed by the joint M-DCPS/UTD Evaluation Committee. The Committee shall make recommendations. The parties shall collaboratively amend/modify IPEGS. These modifications and amendments will be made prior to the 2008-2009 implementation.

The goal is developed early in the school year. The goal describes observable behavior and/or measurable results that would occur when a goal is achieved. The acronym SMART is a useful way to self-assess a goal's feasibility and worth. SMART stands for:

S
Specific
The goal is focused; for example, by content area, by learners' needs.

M
Measurable
An appropriate instrument/ measure is selected to assess the goal.

A
Appropriate
The goal is within the teacher's control to effect change.

R
Realistic
The goal is feasible for the teacher.

T
Time-bound
The goal is contained to a single school year.

The sample physical education goal in the box shows how the SMART criteria are applied. This goal is intended to serve as a model for how goals may be written.

Sample Goal-Physical Education Teacher:

During the 2009-10 school year, 90 percent of my fifth grade physical education students will show improved performance on 3 or more Fitnessgram Tests.

Specific: Focused on physical education, specifically the Fitnessgram Tests.

Measurable: Identified Fitnessgram Tests to be used to assess goal.

Appropriate: The teacher teaches the content and skills contained in the Fitnessgram Tests.

Realistic: The goal of improving 90 percent of the targeted students' performance is realistic. It is not out of reach and yet not too easy.

Time-bound: Goal attainment can be addressed by the end of the year with the end-of-year Fitnessgram Tests.

Submission of the Goal Setting for Learner/Program Progress Form

Professionals complete sections I through V of the goal setting form, sign it, and submit it to their assessor for review and approval. Goals are reviewed by an assessor using the SMART criteria. Assessors approve all goals that meet the SMART criteria. If necessary, a meeting to discuss the goal may be scheduled. The goal is submitted by the date of the first student interim progress report or within the first 25 calendar days of a new teaching assignment. Professionals hired in the second grading period, after the interim progress reports have been issued are exempt from goal setting for the current year. In this case, the assessor must consider other measures to rate performance standard 1.

Mid-Year Review of Goal

A mid-year review of progress on the goal is held for all professionals. This review should promote discussion, collegiality, and reflection. The mid-year review is to be held after the second grading period student interim progress reports are issued (in the second grading period) and before the end of the second grading period. The mid-year review is held in a forum determined (e.g., individual, small group setting) by the assessor.

In preparation for the mid-year review discussion, the professional must review progress made toward the goal. Formal/informal data and/or a summary can be used to show progress toward the goal and effectiveness of strategies. It is not necessary to administer a formal mid-year assessment. However, if data are available then the instructional professional may report the data. Instructional personnel may decide how best to present their progress. Common ways include, but are not limited to, a reflective paragraph, data presentation in a graph or table with accompanying explanation, bulleted list, and work samples. This addresses the documentation required by section six of the *Goal Setting for Learner/Program Progress Form*.

End-of-Year Review of Goal

The School Board is to appoint instructional staff "no later than 3 weeks following the receipt of FCAT scores and data, or June 30, whichever is later." Florida Statute §1012.22(1)(b)

Professionals assess learner/program measures for end-of-year goal progress. The end-of-year review of the goal is submitted on the *Documentation Cover Sheet-Teacher* (discussed later in this section) as indicated in section seven of the *Goal Setting for Learner/Program Progress Form* to the assessor at least 10 calendar days prior to the summative evaluation meeting. Accompanying data and other evidence of goal progress may be included in the summary and/or attached to the *Documentation Cover Sheet-Teacher*. The assessor reviews the submission within the 10 day timeframe prior to the summative meeting and determines if further data is warranted. Goal attainment/progress results are indicated on the original goal setting form by the assessor.

OBSERVATIONS

The *Observation of Standards Form-Teacher* (see Pg. 50 Part III) is used to provide targeted feedback on professionals' work relating to the performance standards. Given the complexity of the job responsibilities of teachers, it is likely that an assessor will be able to observe multiple standards in a formal observation,

particularly evidence of performance standards 1, 2, 3, and 8. An assessor may make notes (evidence may be positive or negative) regarding all performance standards on the form; however, the assessor may choose to defer notes to the Summative Evaluation Report and/or Documentation Cover Sheet–Assessor on some performance standards. During the post-observation meeting, the professional and the administrator will discuss the observation. No ratings are given during the post-observation meeting as assessors use multiple data sources collected throughout the year to determine ratings at the end of the school year (see Pg. 26 Making Summative Decisions).

Assessors are to assess the performance standards by observing instruction, performance of students and other applicable indicators at various times throughout the evaluation cycle. The standards that are not directly observed during the formal observation may be discussed during the post-observation meeting. Observations may be scheduled or unscheduled. No formal observation/evaluation shall be conducted during an employee's first 10 days and last 10 days with student contact.

Documenting Observations

The minimum number of required observations varies by contract status (see Table 5). The professional and the administrator will meet to discuss the observation within 10 calendar days of the observation. The assessor may ask the professionals to bring a copy of the lesson plan/planning document to the meeting. Professionals will have the right to present additional information/documents about what was observed and notations summarized on the *Observation of Standards Form*. Any written response(s) provided by the professional shall be attached to the form and placed in the personnel file. Professionals receive a copy of the completed form from their assessor.

A required observation is a minimum of 20 consecutive minutes. Where appropriate, the observation could last longer. The observation should cover an appropriate sample of the professional's work. Additionally, more than the minimum number of required observations may occur as appropriate.

Table 5: Observation by Contract Status

Contract Status	Required Number of Observations a Year	Timeframe*
Annual Contract	2	1 per semester, concluding by the end of the third grading period
Professional Service Contract	1	By the end of the third grading period
Continuing Contract	1	By the date of the last interim/progress report in the fourth grading period

Exceptions to the timeframe may exist; refer the current Office of Professional Standards Handbook.

REQUIRED DOCUMENTATION

The purpose of the *Required Documentation* (see Part III) is to provide evidence of performance related to specific standards. Documentation is not required for all performance standards as other data sources may be used. The required items provide administrators with additional information they likely would not receive in an observation. Specifically, the collection of documentation provides the professional with an opportunity for self-reflection, demonstration of quality work, and a basis for two-way communication with an administrator. The emphasis is on the quality of work, not the quantity of materials presented. Specific items are required of all professionals to be submitted and stapled to the *Documentation Cover Sheet-Teacher*, serving as the transmittal. They are:

- *Goal Setting for Learner/Program Progress* Update – Summarize the End-of-Year Data Results on the *Documentation Cover Sheet-Teacher* for the completion of section VII of the *Goal Setting Form* and attach accompanying data/evidence to the cover sheet.
- Communication Log – provide evidence of how the professional communicates with stakeholders. A sample form is provided in Part III. Professionals who document contacts with stakeholders (e.g., colleagues, parents/guardians, administrators) in another format (e.g., folders, electronically) should share their method and documentation in that format. Professionals do not have to use the sample communication log. The key is for the professional to provide evidence to the assessor of effective communication.
- Professional Development/Professional Growth Experiences Log – provide evidence of professional growth activities. To count as a professional development activity, Master Plan Points or credit should have been offered to the participating professional. Professionals must demonstrate that some of the professional growth experiences relate to the current work assignment/population. Additionally, professionals may provide evidence of other activities that result in professional growth. A sample form is provided in Part III. Professionals maintain their own documentation of professional growth using such items as: Center for Professional Learning record of inservice, workshop certificates, college transcripts, conference certificates, or National Board Certification.

Furthermore, the required documentation is used to organize the multiple data sources included in the summative evaluation.

The documents are submitted to the assessor 10 calendar days prior to the date of the summative evaluation conference with the administrator. Assessors review the required documentation items and make notes on the *Documentation Cover Sheet-Assessor*. The assessor maintains the documentation cover sheets and returns the original documents submitted to the professional during the summative evaluation meeting.

For reasons of confidentiality, any documents that contain personal information about individuals other than the employee are to be returned to the employee upon completion of the summative evaluation review or redacted, as appropriate.

The purpose of parental input is to collect information that will help teachers reflect on their practice (i.e., for formative evaluation); in other words, to provide feedback directly to the employee for professional growth and development.

Parental input is gathered through the use of the *School Climate Survey*, the Educational Excellence School Advisory Council (EESAC) participation and the Open House Parent Academy Survey in schools, as applicable. Professionals show evidence of communication with parents as reflected on their communication log.

INTEGRATION OF DATA

Some performance standards are best documented through observation (e.g., Learning Environment); other standards may require additional documentation techniques (e.g., Learner Progress entails a review of the goal set and data). Therefore, multiple data sources are used.

Formal evaluation of performance quality typically occurs at the summative evaluation stage, which comes at the end of the evaluation cycle (e.g., school year). The ratings for each performance standard are based on multiple sources of information and are completed only after pertinent data from all sources have been reviewed. The integrated data constitute the evidence used to determine the performance ratings for the summative evaluation for professionals in their summative evaluation year (see *Summative Performance Evaluation-Teacher*, Part III). Further details on the rating process are provided in subsequent sections of this handbook.

Summative evaluation meetings are to be conducted by assessors 10 days prior to the last day of the students' school year for all contract types. Table 6 details the timeline to be followed. As illustrated, the procedures for evaluating the performance of professionals rely on multiple data sources, including, but are not limited to, observations and goal setting.

Modifications to the evaluation schedule are made for instructional personnel in unique teaching conditions, such as semester teachers, teachers whose assignment changes, and professionals going on leave/returning from leave. Observations should be completed as close to the established timeline as possible in the event the professional is going on /returning from leave. If assessors have completed the required formal observation(s) and a professional's work assignment changes, assessors are not required to do an additional formal observation. The following guidance is provided for special circumstances regarding the goal setting process.

- *Semester teachers* - the goal setting timeline is truncated such that they set their learner goals for the first semester. The semester teacher completes section VII of the form at the end of the semester as opposed to the end of the school year. Section VII is still submitted with the *Documentation Cover Sheet-Teacher* at the end of the year for the summative review.

- *Professionals whose assignment changes* – within 25 calendar days of a new work assignment, the professional should submit a goal appropriate to the new work situation.
- *Professionals hired prior to the date of second student interim progress report* – within 25 calendar days of beginning the position, the professional should submit a goal appropriate to the work situation.

The following professionals are exempt from completing the goal setting process for the current school year.
- Professionals on an approved leave
- Professionals hired in second grading period, after the second student interim reports have been issued

Assessors will 1) mark "exempt" on the *Documentation Cover Sheet-Assessor* and 2) leave the goal setting box on the *Summative Performance Evaluation Report* blank. Assessors must then consider other measures to rate performance standard 5, as applicable to the time period that the learners have been assigned to that professional. Examples of other measures may include authentic measures, criterion or norm referenced tests, etc.

Instructional Personnel New to M-DCPS

Annual 1 Contract instructional personnel participate in a district comprehensive orientation session at the beginning of the school year; otherwise, it is the responsibility of the site administrator to provide the orientation. The orientation consists of written and oral explanations of IPEGS.

> "All personnel must be fully informed of the criteria and procedures associated with the assessment process before the assessment takes place."
> Florida Statute § 1012.34

DOCUMENTATION RECORDS

If the professional transfers within M-DCPS, the documentation is to be forwarded to the receiving school/worksite's site administrator. At the end of an evaluation cycle, the site administrator retains the originals of the goal-setting form, documentation cover sheets, *Observation of Standards Form(s)-Teacher*, and summative evaluation form at the school/worksite. All original attachments to the documentation cover sheet are returned to the professional at the summative meeting.

Storage of Records
- Site personnel file: completed goal-setting form, documentation cover sheets, *Observation of Standards Form(s)-Teacher*, summative evaluation copy and any written response(s) provided by the professional.
- District department of Personnel Records: original *Summative Performance Evaluation-Teacher Form* to be sent according to the District's End of Year calendar/procedures and any written response(s) provided by the professional.
- All other original material/documentation is to be returned to the professional.

Table 6: IPEGS Timeline

Timeline	Activity	Task or Document	Responsibility of (A) Assessor or (P) Professional	
			A	P
By the date of the first student interim progress report	Establish and submit learner/program progress goal	Goal Setting for Learner/Program Progress Form		✓
By end of the first grading period	Review goals for SMART criteria	Goal Setting for Learner/Program Progress Form	✓	
Timeline for semester teachers TBA	Establish and submit learner/program progress goal	Goal Setting for Learner/Program Progress Form		✓
By the end of the first grading period	Observation of new teachers to M-DCPS and to the school with post-observation meeting	Observation of Standards Form-Teacher	✓	
By the end of the second grading period	First observation of annual contract teachers with post-observation meeting	Observation of Standards Forms-Teacher	✓	
Timeline for semester teachers TBA	Mid-year review of goal	Goal Setting for Learner/Program Progress Form	✓	✓
By the end of the third grading period	Second observation of annual contract teachers and professional service contract teachers with post-observation meeting	Observation of Standards Form-Teacher	✓	
After second student interim progress report and by end of the second grading period	Mid-year review of goal	Goal Setting for Learner/Program Progress Form	✓	✓
By the date of the last student interim progress report	Observation with post-observation meeting of Continuing Contract teachers	Observation of Standards Form-Teacher	✓	
At least 10 calendar days prior to summative evaluation date	- Submission of the Documentation Cover Sheet-Teacher - Submission of end-of-year review of goal	Documentation Cover Sheet-Teacher and related documents (I.e., Communication Log, Professional Development/Professional Growth Experiences Log, Goal Setting for Learner/Program Progress Form)		✓
By 10 calendar days prior to the last day of the students' school year	Complete all summative evaluation meetings	Summative Evaluation Form and Documentation Cover Sheet-Administrator Site administrator submits the signed form to Personnel Records as indicated by the District calendar/procedures	✓	

MAKING SUMMATIVE DECISIONS

Two major considerations apply when assessing job performance during summative evaluation:

1) the performance standards and
2) the documentation of the actual performance of the standards (observations, goal setting, required documentation).

The performance appraisal rubric (see Part II) provides a description of well-defined teacher performance standards.

The rating scale describes four levels of how well the standards (i.e., duties) are performed on a continuum from "exemplary" to "unsatisfactory." The use of the scale enables assessors to acknowledge teachers who exceed expectations (i.e., "exemplary"), note those who meet the standard (i.e., proficient), and use the two lower levels of feedback for teachers who do not meet expectations (i.e., "developing/needs improvement" and "unsatisfactory").

The following sections define the four levels, provide detailed information about the performance of expectations for improvement purposes, and describe the decision-making process for assessing performance. *PLEASE NOTE: Ratings are applied to individual performance standards, NOT performance indicators. Performance indicators only inform assessors as to examples of performance relevant to the standards. Further, the assessor determines the degree to which the performance standard is being performed.*

The site administrator uses four levels when assessing performance of standards (i.e., "exemplary," "proficient," "developing/needs improvement," "unsatisfactory"). Table 7, page 27 offers general descriptions of those ratings.

Who Decides on the Ratings?

The site administrator has the ultimate responsibility for ensuring that IPEGS is executed faithfully and effectively in the school/worksite. Yet, for an evaluation system to be meaningful, it must provide its users with relevant and timely feedback. Administrators, such as assistant principals, may be designated as the assessor to supervise, monitor, and assist with the multiple data source collection.

	in:	curriculum standards for their content area using an inquiry-based approach. They will engage in activities that will expose them to their content-area plan, including the Next Generation Standards. Incorporated in this session will be the District 's Pacing Guide and rigorous instructional activities that promote Webb's levels of complexity.
	• Curriculum standards • Instructional focus • District Pacing Guides • Content area plans • Rigorous instructional strategies • Webb's levels of complexity	

Monthly follow-up sessions will provide participating teachers with opportunities to reflect on their practice, dig deeper into content areas and sustain their learning. These professional learning communities will be facilitated by National Board Certified Teachers (NBCTs) and staff from Curriculum & Instruction. The sessions will focus on the curriculum, lesson planning, data analysis and examining student work.

DRAFT

UNITED TEACHERS OF DADE

EVALUATION TOOLS

►IPEGS

INSTRUCTIONAL PERFORMANCE EVALUATION AND GROWTH SYSTEM
SUMMATIVE PERFORMANCE EVALUATION-STUDENT SERVICES PROFESSIONAL

Professional: _____ **Employee Number:** _____

School/Worksite: _____ **School Year:** _____ **Current Assignment:** _____

Area(s) of Certification: _____ **Date(s) of Observation:** _____

Contract Status: ☐ Annual 1 ☐ Annual 2 ☐ Annual 3 ☐ Annual ____ ☐ Professional Service ☐ Continuing Contract

Documentation Reviewed: ☐ Required Documentation ☐ Goal Setting ☐ Observation ☐ Other _____

Directions:

Assessors use this form at the end of the school year to provide the professional with an assessment of performance. The actual performance standard appears in bold on the rubric. The assessor and the professional initials each page of this form. The professional receives a copy of the form. A comment must be provided for any rating below proficient. The signed form is submitted to the district office as indicated by the district calendar/procedures.

PERFORMANCE STANDARD 1: LEARNER PROGRESS

Exemplary *The professional's work is exceptional, in addition to meeting the standard.*	Proficient *The description is the actual performance standard.*	Developing/Needs Improvement	Unsatisfactory
The work of the student services professional consistently results in a high level of learner or program progress.	**The work of the student services professional results in acceptable and measurable progress based on established standards, district goals, school goals, and/or the professional's goals.**	The work of the student services professional results in learner or program progress but often does not meet the established standard and/or is not achieved with all populations of learners.	The work of the student services professional consistently fails to result in acceptable learner or program progress based on established standards, district goals, school goals, and/or the professional's goals.
☐	☐	☐	☐

Comments

PERFORMANCE STANDARD 2: KNOWLEDGE OF LEARNERS

Exemplary *The professional's work is exceptional, in addition to meeting the standard.*	Proficient *The description is the actual performance standard.*	Developing/Needs Improvement	Unsatisfactory
The student services professional often addresses the needs of the target learning community in a highly effective manner.	**The student services professional identifies and addresses the needs of the target learning community by demonstrating respect for individual differences, and understanding of cultures, backgrounds, and learning styles.**	The student services professional attempts, but is often ineffective in demonstrating knowledge and understanding of the needs of the target learning community.	The student services professional consistently demonstrates a lack of awareness of the needs of the target learning community or fails consistently to make appropriate accommodations to meet those needs.
☐	☐	☐	☐

Comments

Assessor Initials: _____

Professional Initials: _____

Professional: _____ Employee Number: _____

School/Worksite: _____ Work Location #: _____School Year: _____

PERFORMANCE STANDARD 3: PROGRAM MANAGEMENT

Exemplary *The professional's work is exceptional, in addition to meeting the standard.*	Proficient *The description is the actual performance standard.*	Developing/Needs Improvement	Unsatisfactory
The student services professional consistently monitors, evaluates, modifies, and/or designs program/services that impact learners.	**The student services professional plans, organizes, and manages programs and/or services to meet the diverse needs of all learners.**	The student services professional is often ineffective in planning, organizing, and managing services to meet the diverse needs of all learners.	The student services professional consistently fails to plan, organize, or manage services to meet the diverse needs of all learners.
☐	☐	☐	☐
Comments			

PERFORMANCE STANDARD 4: PROGRAM DELIVERY

Exemplary *The professional's work is exceptional, in addition to meeting the standard.*	Proficient *The description is the actual performance standard.*	Developing/Needs Improvement	Unsatisfactory
The student services professional consistently demonstrates a high level of performance and utilizes best practices in the delivery of services.	**The student services professional uses knowledge of subject/content/field/ technology to implement services for learners and the learning community consistent with established standards and guidelines.**	The student services professional often implements services ineffectively to learners and the targeted learning community consistent with established standards and guidelines.	The student services professional consistently fails to implement or improperly implements services to the targeted learning community in a manner that is aligned with established standards and guidelines.
☐	☐	☐	☐
Comments			

PERFORMANCE STANDARD 5: ASSESSMENT

Exemplary *The professional's work is exceptional, in addition to meeting the standard.*	Proficient *The description is the actual performance standard.*	Developing/Needs Improvement	Unsatisfactory
The student services professional consistently demonstrates expertise in monitoring current data to benefit learner/program outcomes and/or supports colleagues in understanding and using data.	**The student services professional gathers, analyzes, and uses data (including FCAT state assessment data, if applicable) to measure and guide learner or program progress, and to provide timely feedback.**	The student services professional is often ineffective in using data to measure and guide learner progress and to provide timely feedback.	The student services professional consistently fails to use data to measure and guide progress and to provide timely feedback.
☐	☐	☐	☐
Comments			

Assessor Initials: _____

Professional Initials: _____

Professional: _____ **Employee Number:** _____

School/Worksite: _____ **Work Location #:** ____ **School Year:** _____

PERFORMANCE STANDARD 6: COMMUNICATION

Exemplary *The professional's work is exceptional, in addition to meeting the standard.*	Proficient *The description is the actual performance standard.*	Developing/Needs Improvement	Unsatisfactory
The student services professional often designs or implements model communication programs, services, or techniques that result in improved collaboration with others to enhance learning.	**The student services professional communicates effectively with learners, their parents or families, staff, and other members of the learning community and advocates for learners.**	The student services professional often communicates ineffectively with students, staff, and/or other members of the learning community.	The student services professional consistently fails to communicate effectively with students, staff, and/or other members of the learning community.
☐	☐	☐	☐
Comments			

PERFORMANCE STANDARD 7: PROFESSIONALISM

Exemplary *The professional's work is exceptional, in addition to meeting the standard.*	Proficient *The description is the actual performance standard.*	Developing/Needs Improvement	Unsatisfactory
The student services professional consistently demonstrates a high level of professionalism, contributes to the professional growth of others, and assumes a leadership role within the learning community.	**The student services professional demonstrates behavior consistent with legal, ethical, and professional standards and engages in continuous professional growth.**	The student services professional often does not display professional judgment or only occasionally participates in professional growth.	The student services professional fails to adhere to legal, ethical, or professional standards, including all requirements for professional growth.
☐	☐	☐	☐
Comments			

<div align="center">

Signatures of Record

</div>

_____
Assessor's Signature/Date
This signature may not be applicable.

_____
Professional's Signature/Date
Signature denotes the meeting occurred.

☐ *Written Response by Professional attached, if applicable. Date:* _____

Recommendation by the Site Administrator

☐ **Recommended**   ☐ **Not Recommended**
  for continued employment   for continued employment

_____
Principal/Site Administrator's Signature/Date
Signature denotes final determination of the ratings and recommendation for continued employment.

The professional will receive a copy of the form prior to when the form is submitted to the District.

Pursuant to Florida Statute §1012.31 (3) (a) 2: An employee evaluation "shall be confidential ... until the end of the school year immediately following the school year in which the evaluation was made."

Miami-Dade County Public Schools

INSTRUCTIONAL PERFORMANCE EVALUATION AND GROWTH SYSTEM
OBSERVATION OF STANDARDS FORM-TEACHER

Teacher: _____ Employee No. _____ School: _____

Contract Status: ☐ Annual 1   ☐ Annual 2   ☐ Annual 3   ☐ Annual ____   ☐ Professional Service   ☐ Continuing

Observation: ☐ 1 ☐ 2 ☐ 3 ☐ 4 ☐ 5 ☐ ____   Interim Teacher Incumbent Yes ☐   No ☐

Grade/Subject Observed: _____ Date: _____ Time: From _____ To _____

Assessors use this form to document the required annual formal observation of the teacher. The form may also be used to document a targeted performance standard, in which case "NA" is noted for the other standards. Evidence may be positive and/or negative examples. (For further explanation in completion of this form, refer to the IPEGS Teacher Handbook.)

PERFORMANCE STANDARD 1: LEARNER PROGRESS The work of the teacher results in acceptable and measurable learner progress based on state/local standards, district goals, school goals and/or the teacher's goals.	☐ **Not an observable standard – No comment required unless warranted.**
PERFORMANCE STANDARD 2: KNOWLEDGE OF LEARNERS The teacher identifies and addresses the needs of learners by demonstrating respect for individual differences, cultures, backgrounds, and learning styles.	*Comment Required*
PERFORMANCE STANDARD 3: INSTRUCTIONAL PLANNING The teacher uses appropriate curricula (including state reading requirements, if applicable), instructional strategies, and resources to develop lesson plans that include goals and/or objectives, learning activities, assessment of student learning, and home learning in order to address the diverse needs of students.	*Comment Required*
PERFORMANCE STANDARD 4: INSTRUCTIONAL DELIVERY AND ENGAGEMENT The teacher promotes learning by demonstrating accurate content knowledge and by addressing academic needs through a variety of appropriate instructional strategies and technologies that engage learners.	*Comment Required*
PERFORMANCE STANDARD 5: ASSESSMENT The teacher gathers, analyzes, and uses data (including FCAT state assessment data, as applicable) to measure learner progress, guide instruction, and provide timely feedback.	☐ **Not an observable standard – No comment required unless warranted.**
PERFORMANCE STANDARD 6: COMMUNICATION The teacher communicates effectively with students, their parents or families, staff, and other members of the learning community.	☐ **Not an observable standard – No comment required unless warranted.**
PERFORMANCE STANDARD 7: PROFESSIONALISM The teacher demonstrates behavior consistent with legal, ethical, and professional standards and engages in continuous professional growth.	☐ **Not an observable standard – No comment required unless warranted.**
PERFORMANCE STANDARD 8: LEARNING ENVIRONMENT The teacher creates and maintains a safe learning environment while encouraging fairness, respect, and enthusiasm.	*Comment Required*

☐ **Professional Support and Assistance Required (If additional conversations are needed, document as appropriate.)**

Conversation Date: _____ Professional Support and Assistance Status: ☐ Completed ☐ Continued

Conversation Date: _____ Professional Support and Assistance Status: ☐ Completed ☐ Continued

Conversation Date: _____ Professional Support and Assistance Status: ☐ Completed ☐ Continued

Comments/Specific Suggestions

If performance is unsatisfactory complete this section by marking the appropriate boxes.

Deficiencies noted in the following performance standard(s): 1 ☐ 2 ☐ 3 ☐ 4 ☐ 5 ☐ 6 ☐ 7 ☐ 8 ☐

Assessor Action: Support Dialogue ☐   Improvement Plan ☐

Signatures acknowledge the occurrence of the post-observation meeting and receipt of a copy of the observation form by the professional.

Assessor's Signature _____ Date _____

Teacher's Signature _____ Date _____

FM-7315 Rev. (07-10)

Miami-Dade County Public Schools

INSTRUCTIONAL PERFORMANCE EVALUATION AND GROWTH SYSTEM
OBSERVATION OF STANDARDS FORM-INSTRUCTIONAL SUPPORT PROFESSIONAL

Professional: _____ **Employee No.** _____ **Worksite:** _____

Contract Status: ☐ Annual 1 ☐ Annual 2 ☐ Annual 3 ☐ Annual ___ ☐ Professional Service ☐ Continuing

Observation: ☐ 1 ☐ 2 ☐ 3 ☐ 4 ☐ 5 ☐ ____   **Interim Teacher Incumbent** Yes ☐ No ☐

Grade/Subject Observed: _____ **Date:** _____ **Time: From** _____ **To** _____

Assessors use this form to document the required annual formal observation of the professional. The form may also be used to document a targeted performance standard, in which case "NA" is noted for the other standards. Evidence may be positive and/or negative examples. (For further explanation in completion of this form, refer to the IPEGS Instructional Support Personnel Handbook.)

PERFORMANCE STANDARD 1: LEARNER PROGRESS The work of the instructional support professional results in acceptable and measurable learner or program progress based on established standards, district goals, school goals, and/or the professional's goals.	☐ **Not an observable standard – No comment required unless warranted.**
PERFORMANCE STANDARD 2: KNOWLEDGE OF LEARNERS The instructional support professional identifies and addresses the needs of the target learning community by demonstrating respect for individual differences, and understanding of cultures, backgrounds, and learning styles.	*Comment Required*
PERFORMANCE STANDARD 3: PROGRAM MANAGEMENT The instructional support professional plans, organizes, promotes, and manages programs and/or services to meet the diverse needs of all learners.	*Comment Required*
PERFORMANCE STANDARD 4: PROGRAM DELIVERY The instructional support professional uses knowledge of subject/content/field/technology to implement services for the targeted learning community consistent with established standards and guidelines.	*Comment Required*
PERFORMANCE STANDARD 5: ASSESSMENT The instructional support professional gathers, analyzes, and uses data (including FCAT state assessment data, if applicable) to measure and guide learner or program progress, and to provide timely feedback.	☐ **Not an observable standard – No comment required unless warranted.**
PERFORMANCE STANDARD 6: COMMUNICATION The instructional support professional communicates effectively with learners, their parents or families, staff, and other members of the learning community.	☐ **Not an observable standard – No comment required unless warranted.**
PERFORMANCE STANDARD 7: PROFESSIONALISM The instructional support professional demonstrates behavior consistent with legal, ethical, and professional standards and engages in continuous professional growth.	☐ **Not an observable standard – No comment required unless warranted.**

☐ **Professional Support and Assistance Required (If additional conversations are needed, document as appropriate.)**

Conversation Date: _____ **Professional Support and Assistance Status:** ☐ Completed ☐ Continued

Conversation Date: _____ **Professional Support and Assistance Status:** ☐ Completed ☐ Continued

Conversation Date: _____ **Professional Support and Assistance Status:** ☐ Completed ☐ Continued

Comments/Specific Suggestions

If performance is unsatisfactory complete this section by marking the appropriate boxes.
Deficiencies noted in the following performance standard(s): 1 ☐ 2 ☐ 3 ☐ 4 ☐ 5 ☐ 6 ☐ 7 ☐
Assessor Action: Support Dialogue ☐   Improvement Plan ☐

Signatures acknowledge the occurrence of the post-observation meeting and receipt of a copy of the observation form by the professional.

Assessor's Signature _____ Date _____

Professional's Signature _____ Date _____

FM-7313 Rev. (07-10)

DADE COUNTY SCHOOLS ADMINISTRATORS' ASSOCIATION (DCSAA)

EVALUATION TOOL

- ➢ TIMELINE
- ➢ PLANNING FORM
- ➢ PROGRESS FORM
- ➢ EVALUATION FORM

APPENDIX C

REQUIRED FORMS AND TIMELINES

REQUIRED FORMS	TIMELINE
PLANNING PHASE for all employees	**Commencing no later than June 30 of the closing year**, and in conjunction with the End-of-Year Evaluation Conference. (An amended plan may be developed on or before September 15)
PLANNING FORM For completion **EVALUATION FORM** From previous year for reference	▸ Planning conference(s) between evaluator and employee shall be conducted. ▸ A written plan shall be developed using the Planning Form of the Performance Planning and Evaluation System. ▸ Subsequent formal Progress Conference(s) shall occur at the discretion of the evaluator according to the performance of the employee. ▸ The Progress Form and the Evaluation Form shall be discussed with the reviewer in advance of the Progress and Evaluation Conferences.
Employees not on the regular schedule of planning and evaluation activities because of assignment to a new work location during the year shall be scheduled for a conference within two months of their initial planning conference to review performance to date.	

PROGRESS PHASE	By January 31:
PROGRESS FORM for completion **PLANNING FORM** For reference and updating **PROFESSIONAL IMPROVEMENT PLAN**	► A mid-year Progress Conference shall be held with every employee. Copies of this completed Progress Form are to be filed in the evaluator's and employee's offices. ► For each employee whose overall performance rating is Unacceptable, a written Professional Improvement Plan shall be provided. This plan shall specify timelines and activities, which address the designated performance standards and/or competencies to be improved. A copy of the Progress Form and the Professional Improvement Plan Form shall be forwarded to the Office of Professional Standards. ► Any employee whose official performance rating is Unacceptable shall be notified of the possible recommendation for non-reappointment if unsatisfactory performance continues.
	By April 15:
	► A Progress Form shall be completed and filed in the Office of Professional Standards for non-school site employees being recommended for non-reappointment who have been on a professional improvement plan.
	► Evaluation of performance shall continue for the balance of the contract year.

Employees not on the regular schedule of planning and evaluation activities because of assignment to a new work location during the year shall be scheduled for a conference within two months of their initial planning conference to review performance to date.

EVALUATION PHASE	By June 30:
EVALUATION FORM For completion	▸ An End-of-Year Evaluation Conference shall be conducted with the employee.
PLANNING FORM From current year-for reference	▸ Evaluation forms for all employees shall be completed and filed in Human Resources and in the office of the reviewer, evaluator, and employee.
CHECKLIST for Non-School Site Employee's Evaluation Form	▸ An initial Planning Form for the upcoming year shall be developed as part of the End-of-Year Evaluation procedure. (See Planning Phase timeline)

MIAMI-DADE COUNTY PUBLIC SCHOOLS

PROFESSIONAL AND TECHNICAL PERSONNEL
PLANNING FORM

EMPLOYEE'S NAME _____

POSITION/TITLE _____

EMPLOYEE NUMBER _____

WORK LOCATION _____

EVALUATOR'S NAME _____

EVALUATOR'S TITLE _____

PERIOD COVERED _____

DATE(S) OF PLANNING CONFERENCE(S) _____

JOB TARGETS	PROGRESS POINTS/EVIDENCE OF PROGRESS	COMPLETE / PARTIAL / NO PROGRESS	COMMENTS

FM-5944 (06-99)

MIAMI-DADE COUNTY PUBLIC SCHOOLS

PROFESSIONAL AND TECHNICAL PERSONNEL PLANNING FORM

Miami-Dade County Public Schools
giving our students the world

EMPLOYEE'S NAME _____

POSITION/TITLE _____

EMPLOYEE NUMBER _____

WORK LOCATION _____

EVALUATOR'S NAME _____

EVALUATOR'S TITLE _____

PERIOD COVERED _____

DATE(S) OF PLANNING CONFERENCE(S) _____

JOB TARGETS	PROGRESS POINTS/EVIDENCE OF PROGRESS	COMPLETE / PARTIAL / NO PROGRESS	COMMENTS

FM-5944 (06-99)

MIAMI-DADE COUNTY PUBLIC SCHOOLS

PROFESSIONAL AND TECHNICAL PERSONNEL PLANNING FORM

Miami-Dade County Public Schools
giving our students the world

EMPLOYEE'S NAME _____

POSITION/TITLE _____

EMPLOYEE NUMBER _____

WORK LOCATION _____

EVALUATOR'S NAME _____

EVALUATOR'S TITLE _____

PERIOD COVERED _____

DATE(S) OF PLANNING CONFERENCE(S) _____

JOB TARGETS	PROGRESS POINTS/EVIDENCE OF PROGRESS	COMPLETE	PARTIAL	NO PROGRESS	COMMENTS
		➡	➡	➡	

FM-5944 (06-99)

MIAMI-DADE COUNTY PUBLIC SCHOOLS

PROFESSIONAL AND TECHNICAL PERSONNEL PLANNING FORM

Miami-Dade County Public Schools
giving our students the world

EMPLOYEE'S NAME _____

POSITION/TITLE _____

EMPLOYEE NUMBER _____

WORK LOCATION _____

EVALUATOR'S NAME _____

EVALUATOR'S TITLE _____

PERIOD COVERED _____

DATE(S) OF PLANNING CONFERENCE(S) _____

JOB TARGETS	PROGRESS POINTS/EVIDENCE OF PROGRESS	COMPLETE	PARTIAL	NO PROGRESS	COMMENTS

MIAMI-DADE COUNTY PUBLIC SCHOOLS

PROFESSIONAL AND TECHNICAL PERSONNEL PLANNING FORM

Miami-Dade County Public Schools
giving our students the world

EMPLOYEE'S NAME _____

POSITION/TITLE _____

EMPLOYEE NUMBER _____

WORK LOCATION _____

EVALUATOR'S NAME _____

EVALUATOR'S TITLE _____

PERIOD COVERED _____

DATE(S) OF PLANNING CONFERENCE(S) _____

JOB TARGETS	PROGRESS POINTS/EVIDENCE OF PROGRESS	COMPLETE	PARTIAL	NO PROGRESS	COMMENTS
		→	→	→	

FM-5944 (06-99)

MIAMI-DADE COUNTY PUBLIC SCHOOLS

PROFESSIONAL AND TECHNICAL PERSONNEL PLANNING FORM

Miami-Dade County Public Schools
giving our students the world

EMPLOYEE'S NAME _____

POSITION/TITLE _____

EMPLOYEE NUMBER _____

WORK LOCATION _____

EVALUATOR'S NAME _____

EVALUATOR'S TITLE _____

PERIOD COVERED _____

DATE(S) OF PLANNING CONFERENCE(S) _____

JOB TARGETS	PROGRESS POINTS/EVIDENCE OF PROGRESS	COMPLETE PARTIAL NO PROGRESS	COMMENTS

MIAMI-DADE COUNTY PUBLIC SCHOOLS

PROFESSIONAL AND TECHNICAL PERSONNEL
PLANNING FORM

Miami-Dade County Public Schools
giving our students the world

EMPLOYEE'S NAME

POSITION/TITLE

EMPLOYEE NUMBER

WORK LOCATION

EVALUATOR'S NAME

EVALUATOR'S TITLE

PERIOD COVERED

DATE(S) OF PLANNING CONFERENCE(S)

JOB TARGETS	PROGRESS POINTS/EVIDENCE OF PROGRESS	COMPLETE	PARTIAL	NO PROGRESS	COMMENTS

FM-5944 (06-99)

MIAMI-DADE COUNTY PUBLIC SCHOOLS

PROFESSIONAL AND TECHNICAL PERSONNEL PLANNING FORM

Miami-Dade County Public Schools
giving our students the world

EMPLOYEE'S NAME _____

POSITION/TITLE _____

EMPLOYEE NUMBER _____

WORK LOCATION _____

EVALUATOR'S NAME _____

EVALUATOR'S TITLE _____

PERIOD COVERED _____

DATE(S) OF PLANNING CONFERENCE(S) _____

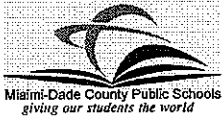| JOB TARGETS	PROGRESS POINTS/EVIDENCE OF PROGRESS	COMPLETE	PARTIAL	NO PROGRESS	COMMENTS
		➤	➤	➤	

MIAMI-DADE COUNTY PUBLIC SCHOOLS
PERFORMANCE PLANNING AND EVALUATION

Miami-Dade County Public Schools
giving our students the world

PROFESSIONAL AND TECHNICAL PERSONNEL
PROGRESS FORM

EMPLOYEE 'S NAME:	EVALUATOR'S NAME:
POSITION/TITLE:	POSITION/TITLE:
EMPLOYEE NUMBER:	PERIOD COVERED:
WORK LOCATION:	DATE(S) PROGRESS CONFERENCE(S):

JOB PERFORMANCE COMPETENCIES

COMPONENTS	ACCEPTABLE	UNACCEPTABLE
I. Planning The employee shows evidence of planning in the execution of job duties.		
II. Judgment/Decisions The employee makes rational decisions in recognizing and solving potential problems.		
III. Interpersonal Relationships/Responsiveness The employee establishes and maintains constructive relationships with peers, supervisors, subordinates, and outside contacts to maintain a positive work environment.		
IV. Technical Proficiencies The employee fulfills all aspects of assigned tasks within the job description.		
V. Quality of Written/Oral Communication The employee demonstrates the ability to understand and verbalize ideas effectively in both written and oral forms.		
VI. Professional Responsibility The employee acts in a professional manner to carry out assigned duties and comply with district and school policies in a timely manner.		

OVERALL EVALUATION

❏ Acceptable	❏ Unacceptable
	(An unacceptable rating requires a Professional Improvement Plan and the checklist must be attached.)

Employee Signature:	**Date:**
Evaluator's Signature:	**Date:**
Reviewer's Signature:	**Date:**

STATUS OF PERFORMANCE AND JOB TARGETS

RECOMMENDATIONS/ADJUSTMENTS, IF NEEDED

MIAMI-DADE COUNTY PUBLIC SCHOOLS
PERFORMANCE PLANNING AND EVALUATION

PROFESSIONAL AND TECHNICAL PERSONNEL
EVALUATION FORM

EMPLOYEE'S NAME:	EVALUATOR'S NAME:
POSITIONITITLE:	EVALUATOR'S TITLE:
EMPLOYEE NUMBER:	EVALUATION PERIOD:
WORK LOCATION:	PROGRESS CONFERENCE DATE(S):

Overall Summary Rating ❑ Acceptable ❑ Unacceptable	Reappointment Recommendation ❑ Yes ❑ No

A.   CATEGORY I: JOB PERFORMANCE COMPETENCIES

COMPONENTS	ACCEPTABLE	UNACCEPTABLE
I. Planning The employee shows evidence of planning in the execution of job duties.		
II. Judgment/Decisions The employee makes rational decisions in recognizing and solving potential problems.		
III. Interpersonal Relationships/Responsiveness The employee establishes and maintains constructive relationships with peers, supervisors, subordinates, and outside contacts to maintain a positive work environment.		
IV. Technical Proficiencies The employee fulfills all aspects of assigned tasks within the job description.		
V. Quality of Written/Oral Communication The employee demonstrates the ability to understand and verbalize ideas effectively in both written and oral forms.		
VI. Professional Responsibility The employee acts in a professional manner to carry out assigned duties and comply with district and school policies in a timely manner.		

B. CATEGORY II: PERFORMANCE RELATED TO JOB TARGETS	❑ Acceptable ❑ Unacceptable

C. CATEGORY III: PROFESSIONAL GROWTH TARGETS	❑ Completed ❑ In Progress

Pursuant to F.S. Chapter 1012.31 (3)(a), employee evaluations shall be confidential until the end of the school year immediately following the school year during which each evaluation is made.

Employee Signature:	Date:
Evaluator's Signature:	Date:
Reviewer's Signature:	Date:

(Employee's signature indicates employee has seen and received the document.)

EVALUATION NARRATIVE WHERE APPROPRIATE

RECOMMENDED JOB TARGETS FOR NEXT YEAR

RECOMMENDED PROFESSIONAL GROWTH ACTIVITIES FOR NEXT YEAR

MANAGERIAL EXEMPT PERSONNEL (MEP)

PERFORMANCE MANAGEMENT ASSESSMENT FOR ADMINISTRATORS

➢ PLANNING PHASE
➢ MID YEAR ASSESSMENT
➢ END OF YEAR ASSESSMENT

MIAMI-DADE COUNTY PUBLIC SCHOOLS
Managerial Exempt Personnel (MEP)
Performance Management Assessment for Administrators

❑ **Mid-Year Assessment Date:** __/__/____   ❑ **End-of-Year Assessment Date:** __/__/____

Assessee's Name: _____

Assessee's Position/Title: _____

Employee Number: _____ Work Location Name/Number: _____

Assessor's Name: _____

Assessor's Position/Title: _____

Assessment Period Covered: _____

Type of Assignment: ❑ School Site   ❑ Non-School Site

PLANNING PHASE

Planning Phase Date: _____

Assessee/Assessor Agreement on:
❑ Key Performance Targets ❑ Administrative Competencies ❑ Professional Growth Targets

---

MID-YEAR ASSESSMENT STATUS

❑ On-Target to Meet Expected Outcomes ❑ Additional Assistance/Resources Required to Meet Expected Outcomes
❑ Intervention Status

END-OF-YEAR OVERALL ASSESSMENT

Total Weighted Rating combines the Administrative Competency Score, including the Key Performance Targets, and the Professional Growth Activity Score. Multiply the "Score" by the "Weight" to compute the Overall Performance Assessment Total.

Component	Score	Weight	Weighted Assessment
MEP Administrative Competencies Points (Including Key Performance Targets)		90%	
Professional Growth Activities Points		10%	
PERFORMANCE ASSESSMENT TOTAL			

❑ **Substantially Exceeds Standards**	❑ **Exceeds Standards**	❑ **Meets Standards**	❑ **Does Not Meet Standards***
96 and Above	95 – 86	85 – 68	67 and Below

*If an employee "**Does Not Meet Standards**," please modify *Component 2: Professional Growth for Administrators* to include specific intervention strategies that address identified areas to be strengthened.

FM-7037 Rev. (01-10)

Component 1: Definitions of MEP Administrative Competencies
Performance Assessment Weight 90%

The following eight competencies for schoolsite and non-schoolsite MEP administrators are aligned with best practice benchmarks and include competencies identified as critical for M-DCPS to achieve the goals outlined in the District's Strategic Plan. Please use the definitions for each of the competencies as a guide when forming your assessment of the assessee.

Competency	Definition
I. Vision	• Demonstrates the knowledge, skills, and disposition to develop, articulate and implement a vision that is shared and supported by the department/school and the community
II. Strategic and Ethical Decision Making	• Plans effectively, uses critical thinking and problem solving techniques, and collects and analyzes data for continuous improvement • Provides and supports an effective instructional/organizational program and applies best practices • Understands and responds appropriately given economic, social, and organizational contexts in order to achieve results-oriented performance • Ensures that decisions and actions conform to the District's moral, ethical, and professional principles
III. Accountability and Assessment	• Effectively uses data and feedback measures to make decisions
IV. Knowledge Management and Innovation	• Uses explicit (recorded) and tacit (personal know-how) knowledge to encourage positive results • Anticipates future demands and circumstances; such as stakeholders' expectations, new organizational opportunities, employee hiring needs and changes in educational requirements and instructional approaches
V. Managing the Environment	• Adapts behavior to the situation and demonstrates flexibility in responding to the needs of all stakeholders • Promotes a positive learning environment • Manages the organization, operations, facilities and resources in ways that maximize the use of resources and promotes a safe, efficient, legal, and effective environment • Understands diversity as it applies to learning theory and a productive climate for faculty, student, support staff and community interaction • Understands, responds to, and influences professional, political, social, economic, legal, and cultural relationships
VI. Human Resources	• Recruits, selects, develops, and retains high-performing personnel • Designs and implements comprehensive individualized professional growth plans
VII. Interpersonal Relationships	• Fosters and maintains mutually beneficial relationships with all stakeholders • Strives to enhance understanding and mutual respect • Acknowledges and responds to needs of others • Manages disagreements and builds consensus
VIII. Community and Stakeholder Partnerships	• Explicitly collaborates and communicates with families, businesses, and community members around District/school priorities • Responds to diverse community interests and needs

FM-7037 Rev. (01-10)

Component 1: Administrative Competencies Key Performance Targets

Key Performance Targets are measurable indicators that determine if a project, activity, initiative, program, etc. has the effect of improving performance and/or adding value to stated goals or objectives.   The key performance targets should be taken from the Superintendent's Goals; Key Performance Indicators; School Improvement Plans or Department/Function Plans, if applicable.

Directions: Identify and briefly describe at least three major performance targets to be accomplished during this year.

1.

2.

3.

FM-7037 Rev. (01-10)

Component 1: MEP Administrative Competencies (Performance Assessment Weight 90%)
□ Mid-Year   □ End-of-Year

<u>Directions</u>: Rate the behavior of the administrator on the eight M-DCPS Administrative Competencies identified below. Mid-Year requires a status indicator of "+" if progress is being made or a "-" if inadequate progress is made. Inadequate progress indicators must be accompanied by a comment.

5 =   *Teaches/Mentors Others:*   Has gained mastery and teaches others how to apply skill
4 =   *Demonstrates Mastery:*   Habitually employs skill
3 =   *Demonstrates Proficiency:*   Has learned skill, but does not routinely apply skill
2 =   *Early Stages of Development:* Is learning both skill and application of skill
1 =   *Does Not Meet Standards:*   Not meeting performance targets as outlined on the performance targets, administrative competencies, and/or professional growth targets

Competency	Teaches/ Mentors Others 5	Demonstrates Mastery 4	Demonstrates Proficiency 3	Early Stages of Development 2	Does Not Meet Standards 1
I. Vision					
Mid-Year Status: □ + □ -					
Articulates and/or garners support for a clear vision for the school/department					
Accepts responsibility for results and decisions					
Comments:					
II. Strategic and Ethical Decision Making					
Mid-Year Status: □ + □ -					
Develops a plan for the school/department that is tied to the vision					
Efficiently implements work plans/operational plans to accomplish plan, meeting all deadlines					
Effectively identifies and solves problems					
Delegates tasks clearly and appropriately to accomplish goals. Allows enough autonomy while providing enough guidance					
Effectively makes ad hoc decisions, as needed, that contribute to student learning gains and operational effectiveness and efficiency while adhering to District's ethical standards					
Comments:					
III. Accountability and Assessment					
Mid-Year Status: □ + □ -					
Uses appropriate diagnostic tools to identify, apply, and assess instructional/organizational improvements					
Monitors instructional/organizational programs, activities, materials and resources on a continuous basis and makes adjustments as needed					
Is comfortable and savvy using technology to support the use of data to improve school/department performance					
Comments:					
Subtotal on this page:					0.00

FM-7037 Rev. (01-10)

Competency	Teaches/ Mentors Others	Demonstrates Mastery	Demonstrates Proficiency	Early Stages of Development	Does Not Meet Standards
	5	4	3	2	1
IV. Knowledge Management and Innovation					
Mid-Year Status: ☐ + ☐ -					
Identifies best practices to promote student achievement or organizational improvement					
Explicitly shares knowledge with staff to encourage positive school/organizational results					
Comments:					
V. Managing the Environment					
Mid-Year Status: ☐ + ☐ -					
Allocates resources according to school/departmental priorities					
Monitors and reports on major sources of fiscal and non-fiscal resources for the school/department, including business and community resources					
Communicates timely and appropriately with supervisor on major issues, problems, and happenings within the environment					
Comments:					
VI. Human Resources					
Mid-Year Status: ☐ + ☐ -					
Recruits, hires, and retains a high-performing, qualified, and diverse staff					
Develops and supports a comprehensive professional growth plan for all direct reports					
Motivates staff effectively and fosters a collaborative work environment so that collective talents are maximized					
Uses flexibility and appropriate supervisory models to maximize each staff's effectiveness					
Comments:					
VII. Interpersonal Relationships					
Mid-Year Status: ☐ + ☐ -					
Communicates in an open, honest and genuine way with all stakeholders					
Develops and maintains an organizational climate conducive to learning and open to discussion and change					
Fosters mutually beneficial relationships with all stakeholders					
Comments:					
VIII. Community and Stakeholder Partnerships					
Mid-Year Status: ☐ + ☐ -					
Mobilizes community resources to support District/school strategic plan					
Shows sensitivity to and communicates with families, businesses, and community members in a timely and effective manner					
Seeks and recognizes allies in the public arena and garners explicit support from those allies					
Comments:					

		Subtotal on this page:	0.00
		Total Administrative Competencies Points: *Subtotal on Page 4 + Subtotal on Page 5*	0.00

	Substantially Exceeds Standards	Exceeds Standards	Meets Standards	Does Not Meet Standards
Overall Administrative Competency Score	96 and Above	95 – 86	85 – 68	67 and Below

FM-7037 Rev. (01-10)

Component 2: Professional Growth for Administrators (Performance Assessment Weight 10%)

❑ Planning | ❑ Mid-Year | ❑ End-of-Year
(Beginning of Assessment Period) | *(Review of Progress)* | *(Overall Final Evaluation)*

SETTING OF PROFESSIONAL GROWTH TARGETS *(TO BE COMPLETED AT THE BEGINNING OF THE YEAR)*

Directions: Use this section to plan the assessee's professional growth activities. Plan targets on which the assessee should focus by looking at the strategic initiatives for the school/department and the assessee's skills against those initiatives. Make every effort to set targets that will be attainable within one *school/fiscal* year. There should be at least one school/departmental/unit goal and one individual/professional growth goal.

PROFESSIONAL GROWTH TARGETS

1.

2.

3.

Professional Growth Target	Key Performance Target or Administrative Competency that will be Impacted	Strategies for Attaining Growth Target	Measurable By (Expected Outcomes)	Completion Date

Signature for Planning Phase:

Assessee's Signature	**Date**	**Assessor's Signature**	**Date**

FM-7037 Rev. (01-10)

Component 2: Professional Growth for Administrators (continued)

☐ Mid-Year ☐ End-of-Year
(Review Progress to Date)   *(Determine Overall Impact of Professional Growth Activities)*

EVALUATION OF PROFESSIONAL GROWTH *(TO BE COMPLETED MID-YEAR AND END-OF-YEAR)*

Directions: Use this section to assess the assessee's professional growth activities. In an effort to foster long-term change, life-long learning, and continuous improvement, the reflective process is critical; therefore, the use of guiding questions should assist individuals in integrating ideas for bringing about long-term improved performance in the workplace and districtwide.

Overall
- Based on the data available, what impact is the assessee having?
- To what extent is the assessee achieving desired results?
- How does the assessee's performance compare to last year at this time?

Strengths and Opportunities for Improvement
- What's working well?
    - Which administrative competencies and/or key performance targets results is assessee achieving?
    - What evidence supports this conclusion?
- What's not working well?
    - Given this year's results so far, what skills should assessee work to improve?
    - What evidence supports that conclusion?
    - Given the goals of the school/department, what skills should assessee work to develop?

Implications
- Given the assessee's areas of need, what are the implications for his/her professional growth plan?
- How can assessor or the District better support the assessee in his/her professional growth targets?
- What additional resources are needed for assessee to reach his/her targets?

☐ Mid-Year Assessment Date: _____/_____/_____   ☐ End-of-Year Assessment Date: _____/_____/_____

Describe Professional Growth Targets that have been achieved and the impact of each:	Describe area(s) for further improvement:

	Captures and formally shares knowledge gained by professional growth activities	Meets all professional growth targets by completion date and completes additional strategic professional growth activities	Meets all professional growth targets by completion date	Did not meet all professional growth targets
Professional Growth Points	125	95	85	67

Signatures indicate participation in the Mid-Year Review

_____   _____   _____   _____
Assessee's Signature   Date   **Assessor's Signature**   Date

FM-7037 Rev. (01-10)

Component 2: Professional Growth for Administrators (continued)
☐ Mid-Year　　☐ End-of-Year

Directions: If the assessee scores a "**Does Not Meet Standards**" on his/her overall assessment, the assessee shall be placed on intervention status and the following portion of the Professional Growth Plan must be completed. This section outlines specific strategies to be completed by the assessee, and to be supported by the assessor, to address each area of deficiency.

				STATUS A or U	
INTERVENTION STATUS					
Key Performance Target(s) and/ or Administrative Competency to be Strengthened	Intervention Strategies	Measurable By/Observable Behaviors	Completion Date	STATUS A or U	

Intervention Status:　Beginning Date: _____　　Ending Date: _____

Overall Status:　_____ A= Acceptable Completion of Activities　　_____ U= Unacceptable Completion of Activities

COMMENT:　_____

_____

Initiation of Intervention Strategies:

_____ _____　_____ _____
Assessee's Signature　　　　　　　　　Date　　　Assessor's Signature　　　　　　　　Date

Completion of Intervention Strategies:

_____ _____　_____ _____
Assessee's Signature　　　　　　　　　Date　　　Assessor's Signature　　　　　　　　Date

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MEP Performance Management System
End of-the-Year Summary Sheet
Office of Human Resources, Recruiting and Performance Management

Employee Details

Employee #	Name	Location	Job Title

End-of-Year Assessment

Component	Score	Weight	Weighted Assessment
Administrative Competencies Score (Including Key Performance Targets)		**90%**	
Professional Growth Score		**10%**	
TOTAL			

☐ Substantially Exceeds Standards	☐ Exceeds Standards	☐ Meets Standards	☐ Does Not Meet Standards
96 and Above	95 – 86	85 – 68	67 and Below

Performance Profile
Executive Summary of Overall Performance (100 words or less)
Key Strengths:

List Key Areas for Improvement/Development:

End-of-Year Final Evaluation Signatures:
Signatures indicate that this evaluation has been reviewed and discussed with the assessor and assessee.

Assessee Signature:		**Date:**	
Assessor Signature:		**Date:**	
Reviewer Signature:		**Date**	
Human Resources Signature:		**Date:**	

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CONFIDENTIAL EXEMPT PERSONNEL (CEP)

EXEMPT/CONFIDENTIAL PERSONNEL EVALUATION

EXEMPT/CONFIDENTIAL PERSONNEL EVALUATION
20___ - 20___

NAME _____ EMPLOYEE NUMBER _____

WORK LOCATION NAME _____ WORK LOCATION NO._____

1. QUALITY OF WORK
(Includes accuracy of completed tasks, achievement of objectives, effectiveness, responsibility and neatness of work product.)

☐ EXEMPLARY   ☐ ABOVE EXPECTATIONS   ☐ MEETS EXPECTATIONS   ☐ BELOW EXPECTATIONS

2. WORK HABITS
(Includes satisfactory attendance, observance of work hours, adherence to School Board policies and guidelines.)

☐ EXEMPLARY   ☐ ABOVE EXPECTATIONS   ☐ MEETS EXPECTATIONS   ☐ BELOW EXPECTATIONS

3. INTERPERSONAL SKILLS
(Includes participation and motivation of others, contribution to office department morale, maintenance of positive relations with the public and office staff.)

☐ EXEMPLARY   ☐ ABOVE EXPECTATIONS   ☐ MEETS EXPECTATIONS   ☐ BELOW EXPECTATIONS

4. DECISION MAKING AND JUDGMENT
(Includes ability to make sound decisions, analyze/understand job complexities, respond in a timely and effective manner. Ability to work with minimal supervision.)

☐ EXEMPLARY   ☐ ABOVE EXPECTATIONS   ☐ MEETS EXPECTATIONS   ☐ BELOW EXPECTATIONS

5. PLANNING AND ORGANIZATION
(Includes ability to plan and organize activities for effective utilization of personnel, equipment and material resources, clearly defines assignments and adheres to time-lines. Demonstrates initiative and resourcefulness in the discharge of responsibility.)

☐ EXEMPLARY   ☐ ABOVE EXPECTATIONS   ☐ MEETS EXPECTATIONS   ☐ BELOW EXPECTATIONS

6. COMMUNICATION
(Includes ability to communicate effectively to various levels of administration, departments, public and private agencies, and parent and community groups. Ability to present ideas clearly.)

☐ EXEMPLARY   ☐ ABOVE EXPECTATIONS   ☐ MEETS EXPECTATIONS   ☐ BELOW EXPECTATIONS

COMMENTS   (Attach additional pages if necessary)

_____
_____
_____
_____
_____
_____

GUIDELINES FOR RATINGS

EXEMPLARY: Performance which consistently exceeds the job requirements and expectations of the position. Use of this rating requires documentation and examples describing exceptional performance. At least five categories must be rated Exemplary and none Below Expectations in order to receive an overall evaluation of Exemplary.

ABOVE EXPECTATIONS: Performance which is better than what is normally expected. The majority (4) of the categories must be rated as Above Expectations or Exemplary and none rated Below Expectations.

MEETS EXPECTATIONS: Performance is as required in an entirely satisfactory manner. All categories will be rated at least Meets Expectations and none rated Below Expectations.

BELOW EXPECTATIONS: Overall performance or specific aspects of performance is unacceptable. The rating of Below Expectations must be preceded by a formal conference for the record between the supervisor and the employee on or before December 31st. A written recommendation for remediation must be attached to the evaluation and given to the employee.

OVERALL EVALUATION RATING

☐ EXEMPLARY   ☐ ABOVE EXPECTATIONS   ☐ MEETS EXPECTATIONS   ☐ BELOW EXPECTATIONS

| EVALUATOR'S SIGNATURE | _____ (Date) |

| EMPLOYEE'S SIGNATURE | _____ (Date) |

(Signature means only that the employee has seen and received the document.)   FM-3090 Rev. (01-04)

EXEMPT/CONFIDENTIAL PERSONNEL EVALUATION
20___ - 20___

NAME _____ EMPLOYEE NUMBER _____

WORK LOCATION NAME _____ WORK LOCATION NO._____

1. QUALITY OF WORK
(Includes accuracy of completed tasks, achievement of objectives, effectiveness, responsibility and neatness of work product.)

☐ EXEMPLARY ☐ ABOVE EXPECTATIONS ☐ MEETS EXPECTATIONS ☐ BELOW EXPECTATIONS

2. WORK HABITS
(Includes satisfactory attendance, observance of work hours, adherence to School Board policies and guidelines.)

☐ EXEMPLARY ☐ ABOVE EXPECTATIONS ☐ MEETS EXPECTATIONS ☐ BELOW EXPECTATIONS

3. INTERPERSONAL SKILLS
(Includes participation and motivation of others, contribution to office department morale, maintenance of positive relations with the public and office staff.)

☐ EXEMPLARY ☐ ABOVE EXPECTATIONS ☐ MEETS EXPECTATIONS ☐ BELOW EXPECTATIONS

4. DECISION MAKING AND JUDGMENT
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☐ EXEMPLARY ☐ ABOVE EXPECTATIONS ☐ MEETS EXPECTATIONS ☐ BELOW EXPECTATIONS

COMMENTS   (Attach additional pages if necessary)

_____
_____
_____
_____
_____
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EVALUATOR'S SIGNATURE _____ (Date)

EMPLOYEE'S SIGNATURE _____ (Date)

(Signature means only that the employee has seen and received the document.)   FM-3090 Rev. (01-04)