Lee County School District | Division of Human Resources and Employee Relations

TEACHER EVALUATION SYSTEM

INTRODUCTION

Traditional evaluation systems have not shown a strong relationship to student achievement (Medley & Coker, 1987; Peterson, 2000). Similarly, recent research specifically related to the School District of Lee County's current evaluation system shows that the principal's evaluation of the teacher has no correlation with student achievement. As a whole, teacher evaluation systems tend not to address performance issues adequately and the results are poorly aligned with the perceptions of educators, both teachers and administrators, with actual teacher performance. Evidence does exist which shows that evaluation systems can improve instruction (Milanowski and Heneman, 2003; Danielson & McGreal, 2000) and positively impact student achievement (Holtzapple, 2003) if properly designed and implemented.

The School District of Lee County has taken the Race to the Top initiative as an opportunity to redevelop its teacher evaluation system with the purpose of ensuring that the system increases student learning growth by improving the quality of instructional, administrative, and supervisory practice. (I.1.a) The system, as detailed in this document, is representative of a standardized approach that will ensure consistency of practice district-wide. Expectations are set and performance goals developed early in the fiscal year. Ongoing monitoring of teacher progress will ensure better alignment of the actual performance to the expected performance, and that performance issues are addressed in a timely manner. The system also brings about greater communication and improved feedback between the employee and the supervisor, significantly improving performance and engagement while also making the evaluation process more meaningful.

According to Danielson and McGreal (2000) the first step in the development of a teacher evaluation system is to determine the process. For the district, this step involved the formation of an evaluation committee comprised of a diverse group of stakeholders. This committee was tasked with examining current research and best practices around teacher evaluation. The result of the committee's work was an evaluation rubric based on the four domains in Charlotte Danielson's *Framework for Teaching.* This framework supports the observation and evaluation of teacher planning and preparation, the classroom environment, instruction, and professional responsibilities. Both the evaluation rubric and the research around the framework informed the development of observation instruments and processes described in this document.

The classroom teacher evaluation rubric was developed by a bargaining task force comprised of teachers, union representatives, and school and district administrators. (II.4.a) The group based their work on the four domains in Charlotte Danielson's *Framework for Teaching*, adjusting the categories and descriptions to support the revised Florida Educator Accomplished Practices and district strategic goals. Teams were created within the task force and each was assigned a domain. The teams worked through multiple revisions of the rubric until they came to consensus on a final version, which was recommended to and tentatively agreed to by the Teachers Association of Lee County (TALC) bargaining team on May 24, 2011. A Memorandum of Understanding, signed by the superintendent and local bargaining unit representative, verifying that the evaluation rubric submitted has been agreed to (pending review by the DOE) in accordance with the district's collective bargaining process can be found in Appendix A. (II.4.c). The rubric serves as the guide for determining a classroom teacher's rating in the area of instructional practice. A committee was convened to modify this rubric for use with non-classroom instructional personnel. The modifications were agreed to by TALC representatives on August 24, 2011 and can be found in Appendix H.

Similarly, a committee on assessment and evaluation was convened to discuss the selection and development of assessments and the plan for incorporating student growth measures into the teacher evaluation system. The District's timeline for the development of student assessments used for evaluation and for incorporating assessments into the evaluation (I.2.b) can be found in Appendix B. The district will adopt state developed assessments as they become available. The district will incorporate growth measures for additional grades and subjects, as the state makes such measures available. (I.2.d)

Student Growth Measures

The District views the first year of implementation as a period of transition, system evaluation, and further planning. During this time, the growth results for classroom teachers and other instructional personnel, including those with less than 3 years of available data, will equal 50% of the evaluation result. (I.2.f) For subjects and grades currently assessed by FCAT Reading, FCAT Math, the Algebra 1 EOC, the Geometry EOC, the Biology EOC, 8th Grade FCAT Science, or SAT-10 Reading, student growth will be calculated based on the students assigned to the teacher of the subject/course. (I.2.e) For subjects and grades not assessed by statewide assessments, the District will use grade-level or school-wide FCAT growth or, where possible, the FCAT or EOC growth of the students assigned to the teacher. For teachers who are assigned solely ESE students at special centers or in the functional skills program, growth will be measured by established learning targets, based upon the goals of the school improvement plan, and approved by the principal (I.2.f). The District will use the state-adopted growth measures for courses associated with FCAT for 2011-12 (I.2.c). The list of student assessments for each subject and grade level for use in 2011-12 can be found in Appendix C. (I.2.a)

As the District's capacity to assess student growth expands, the District will examine how the growth results will be combined for teachers with assignments that utilize results from multiple assessments to equal 50% of the evaluation result (I.2.e). The District will also seek to use a combination of student growth data (30%) and other measurable student outcomes (20%) to evaluate instructional personnel who are not classroom teachers (I.2.f). Additionally, a plan will be developed for using either student achievement or a combination of growth and achievement in subjects for which these measures are more appropriate. (I.2.f)

Instructional Practices

Instructional practice is measured through observation framed by the evaluation rubric. The four domains of the rubric are Domain 1: Planning and Preparation, Domain 2: The Classroom Environment, Domain 3: Instruction, and Domain 4: Professional Responsibilities. Each domain has 5 categories in which teachers will receive ratings. These ratings will account for 50% of the final performance rating, except in years prior to a milestone event, where an additional metric is employed as part of the multi-metric evaluation system. Where the additional metric is used, the additional metric will account for 25% of the final performance rating, with the supervisor ratings on Domains 1 through 4 accounting for an additional 25%. (II.6.c) (II.6.e).

Rating Labels

The rubric makes use of four internal rating labels: Requires Action, Developing, Accomplished, and Exemplary. A rating of *Requires Action* is reflective of a teacher who consistently does not use appropriate strategies and methods or uses them incorrectly or with parts missing. The rating of *Developing* describes a teacher who uses strategies and methods with no significant errors or omissions. *Accomplished* portrays a teacher who uses methods and strategies effectively and is able to monitor and analyze the extent to which desired outcomes are produced. The rating of *Exemplary* describes an Accomplished teacher who goes further by adapting strategies and methods for unique situations. (I.3.a) The scoring process translates these labels into the required final performance ratings of Unsatisfactory, Needs Improvement/Developing, Effective, and Highly Effective, as described below.

The Final Performance Rating

The final performance rating is calculated using a point system with total scores ranging from 0 to 6. (I.3.d) A maximum of 3 points can be earned through the student growth measurement. An additional 3 points can be earned through the observation of instructional practice. In both methods, a rating of Highly Effective is valued at 3 points; Effective is valued at 2; Developing/Needs Improvement is valued at 1; and Unsatisfactory is valued at 0. A teacher receiving Unsatisfactory in either the student growth or the instructional practice portion of the evaluation will receive a final performance rating of Unsatisfactory.

Points for student growth will be assigned using a three step process. The district recognizes that a certain amount of statistical error is expected in the calculation of the value added model (VAM) scores. In order to account for this error, a confidence band around each teacher's VAM score will be calculated. This will allow the district to be 95% certain that a teacher's score falls within one of three bands: VAM score below 0, VAM score crosses 0, or VAM score is above 0. Teachers whose scores fall in the band entirely below 0 will be rated as Unsatisfactory. Teachers whose scores fall in the band entirely above 0 will be rated as Highly Effective and receive 3 points toward student growth. For teachers whose VAM scores fall in the band crossing zero, a second step will be applied to determine the points assigned for student growth.

If a teacher's confidence band crosses zero, it means that the VAM score could be positive or negative. Teachers in this band will be rated either Effective or Developing/Needs Improvement in the area of student growth. In order to determine which rating a teacher will receive, the district will look at the percentage of students assigned to that teacher that met expected gains. Teachers with 30% or more of their students meeting expectations will be rated as effective and receive 2 points toward student. If less than 30% of their students meet expectations, teachers will be rated as Developing or Needs Improvement and receive 1 point toward student growth, as shown in Table 1. The district will follow these two steps for each year of assessment data. For teachers with more than one year of data, a third step will be taken.

Table 1: Assigning Points for Student Growth for Each Year of Data

Score (0-3) for Each Year of Data	Criteria
3 (Highly Effective)	95% Confident VAM score above 0
2 (Effective)	95% Confident VAM score crosses 0 **AND** Students Meeting Expectations ≥30%
1 (Developing/ Needs Improvement)	95% Confident VAM score crosses 0 **AND** Students Meeting Expectations <30%
0 (Unsatisfactory)	95% Confident VAM score below 0

In cases where three years of data are available, the average of the points received toward student growth for each of those three years will be calculated. Where two years of data are available, the average for those two years will be calculated. In both cases, the most recent year will be weighted by counting those points twice.

The overall points received for student growth will be determined by comparing the average points to a range. Teachers whose average is within the range of 2.5 – 3, will be rated as Highly Effective and receive 3 points toward the student growth portion of the final performance rating; an average within the range of 1.5 – 2.49 will result in a rating of Effective and 2 points for student growth; an average within the range of 0.51 – 1.49 will result in a rating of Needs Improvement or Developing and 1 point for student growth; and an average within 0 – 0.50 will result in a rating of Unsatisfactory. Additionally, teachers whose scores, prior to being averaged, were Unsatisfactory in the current year and also Unsatisfactory in any prior year will receive a rating of Unsatisfactory.

Points for instructional practice will be assigned by counting the evaluation rubric ratings determined through final performance evaluation(s). Teachers will receive five ratings in each of the four domains. The system is weighted so that Domain 3, Instruction, has twice the value of the other domains. For a standard evaluation, this results a total of 25 ratings. For an evaluation with a second metric, the number of ratings doubles to 50 to account for the use of evaluation rubrics completed by two different observers. The score assigned is based on a count of each type of rating received. The number of ratings required to receive a particular score varies for beginning teachers, defined as having 0-3 years of teaching experience, and experienced teachers, defined as having 4 or more years of experience. (I.3.b) (II.5.e) The scores and rating requirements are shown in Table 2.

Table 2: Assigning Points for Instructional Practice

Score (0-3)	Beginning Teachers: *Years 1 and 2*	Beginning Teachers: *Year 3 (Multi-Metric)*
3 (Highly Effective)	At least 16 Exemplary ratings No ratings of Requires Action or Developing	At least 32 Exemplary ratings No ratings of Requires Action or Developing
2 (Effective)	At least 20 Exemplary or Accomplished ratings No ratings of Requires Action	At least 44 Exemplary or Accomplished ratings No ratings of Requires Action
1 (Developing)	No more than 2 ratings of Requires Action	No more than 2 ratings of Requires Action
0 (Unsatisfactory)	3 or more ratings of Requires Action	3 or more ratings of Requires Action
Score (0-3)	Experienced Teachers (including newly hired): *Years 4 and on*	
3 (Highly Effective)	At least 19 ratings at Exemplary and no ratings of Requires Action or Developing.	
2 (Effective)	At least 22 ratings at Exemplary or Accomplished and no ratings of Requires Action.	
1 (Developing)	No more than 1 rating of Requires Action	
0 (Unsatisfactory)	2 or more ratings of Requires Action	

The points earned for the student growth measurement are added to the points earned for instructional practice and the final performance rating is assigned based on a range. The range is the same for all teachers. A total score of 2 results in a final performance rating of Developing/Needs Improvement; 3-4 results in Effective; and 5-6 is Highly Effective. Teachers that receive 0 points in either the instructional practice or the student growth portions of the evaluation will receive a final performance rating of Unsatisfactory.

The final performance rating is assigned by the Division of Human Resources and Employee Relations. Supervisors enter the results of the final performance evaluation into the employee's record electronically. The district will apply local calculations to student growth data. The results of the calculations will be imported into the performance management system. The performance management system will calculate the points earned for instructional practice and add those to the points earned for the student growth measure in order to assign a final rating. (I.3.c) Information from the evaluation system will be returned to the teacher as feedback for individual continuous improvement both electronically and through the teacher's supervisor. (III.10.a) The evaluation rubric and scoring system used to define and assign an employee's final evaluation rating can be found in Appendix D and Appendix H. (I.3.b) (II.5.e)

The district has developed a system of observation and evaluation that ensures teachers receive ongoing and consistent feedback from their supervisor throughout the school year. The supervisor, for evaluation purposes, is determined by the school principal or departmental director. The principal or director may take on the role of evaluator or may designate another school or departmental administrator as supervisor for evaluation purposes. (III.17) Input into evaluation by trained personnel other than the designated supervisor will be incorporated as part of the multi-metric evaluation process, as described in the below, corresponding section. (III.18)
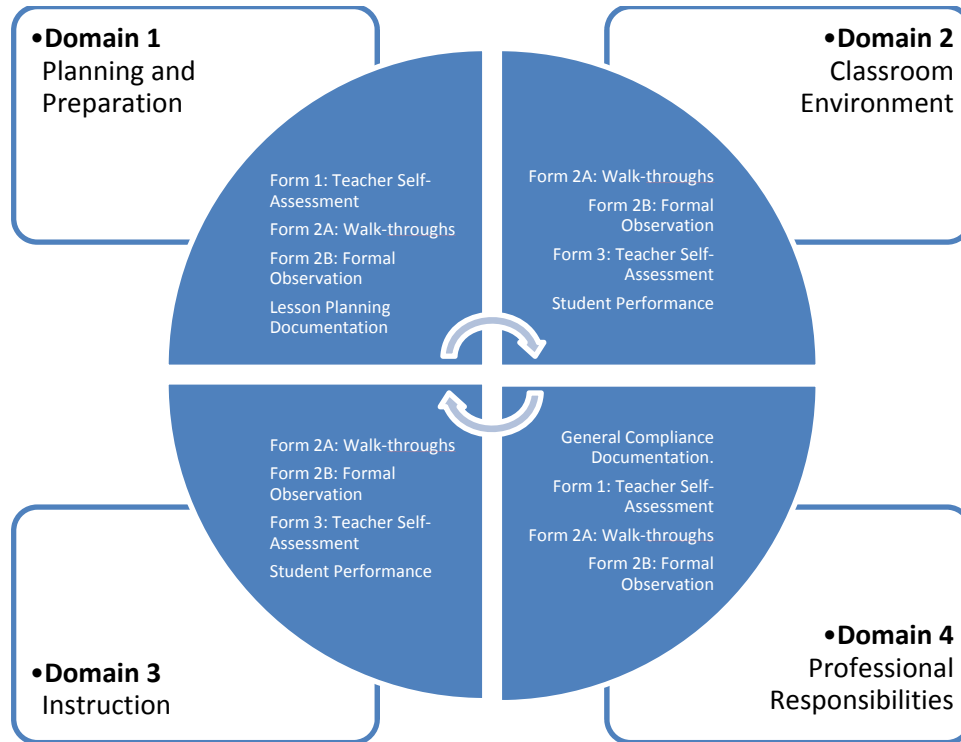
Annual Evaluation of Teachers

Teachers will receive annual evaluations supported by systematic observation. (III.8) The evaluation process begins in August and follows the timeline shown in Table 3. For newly hired teachers, the timeline includes two evaluations during their first year. Parents have the opportunity for input during conferences and meetings with administration. (III.14.a) All formal observations will be reduced to writing and discussed with the teacher within ten days of the observation. No later than five days following the discussion, the teacher will receive a copy of the formal observation report after signing to indicate that the report has been discussed with the teacher. If deficiencies are noted during the observation, the supervisor will provide the teacher with written recommendations for improvement and provide assistance in helping to correct such deficiencies. Evaluation results will be directly linked to professional development opportunities by FY14, as outlined in Appendix F (III.10.b & c). Formal observations will be supported by regular classroom walk-through observations where the supervisor collects data and provides feedback to the teacher.

Table 3. Evaluation System Timeline

August	Evaluation system overview is provided by supervisors (within first 60 days) Supervisors set general goals and expectations
September	First planning conference with teacher (set specific goals and expectations)
October	Complete initial observations Establish follow-up conference/communications *Experienced teachers that are newly hired will receive their first formal observation and evaluation* *Beginning teachers receive their first formal observation and evaluation*
January-February	Mid-Year review to determine progress on goals/expectations Continue conference/communications feedback loop
February-April	*Experienced teachers that are newly hired will receive their second formal observation* *Beginning teachers receive their second formal observation*
April-May	Final performance evaluations are completed for all teachers Follow-up conference/communications

The methods for data collection are designed around the four domains of the evaluation rubric. As outlined in Table 4, methods include the use of district created forms for teacher self-assessment (Forms 1 and 3) and observation instruments (Forms 2A and 2B) with indicators of effective practices (I.1.b). Instruments include detailed connections between the indictors and the FEAPs (I.1.c). The design of and process for the use of these forms was informed by the research of both Charlotte Danielson and Robert Marzano.

Table 4. Evaluation System Data Collection Elements.

•Domain 1
Planning and Preparation

Form 1: Teacher Self-Assessment
Form 2A: Walk-throughs
Form 2B: Formal Observation
Lesson Planning Documentation

•Domain 2
Classroom Environment

Form 2A: Walk-throughs
Form 2B: Formal Observation
Form 3: Teacher Self-Assessment
Student Performance

•Domain 3
Instruction

Form 2A: Walk-throughs
Form 2B: Formal Observation
Form 3: Teacher Self-Assessment
Student Performance

•Domain 4
Professional Responsibilities

General Compliance Documentation.
Form 1: Teacher Self-Assessment
Form 2A: Walk-throughs
Form 2B: Formal Observation

Form 1: Teacher Pre-Observation Tool: Lesson Planning and Professionalism

Prior to a formal classroom observation, the teacher completes the pre-observation lesson planning form by filling out the comments for domain one and four. The teacher sends the lesson planning form to the observer at least two days prior to the observation. The observer reads the plan, provides feedback to the teacher and asks any clarifying questions as necessary, as well as any other questions that would provide helpful information prior to the observation.

Form 2A: Observer Classroom Walk-Through Tool

Prior to the completion of a classroom walk-through, the observer selects a domain or domain category for focus from domains one through four. The walk-through observation is conducted using the appropriate domain category observation form. The observer will complete observation forms within two days of the walk-through. The completed observation form will be available for review by the teacher within two days of the walk-through. It is the intent of the walk-through observation to provide frequent and ongoing feedback to the teacher regarding performance. Post-observation conferences will be scheduled when appropriate. Observers will complete a minimum of 4 walk-throughs per teacher, per semester for a total of at least 8 per teacher per year.

Form 2B: Observer Formal Observation Tool

During the pre-observation conference, teacher and observer discuss the upcoming lesson and identify the focus of the observation by reviewing and discussing Form 1. Together, the teacher and the observer identify the lesson elements that will be of most importance for this observation. Additionally, both teacher and observer review the specific descriptors within Form 2B regarding teacher and student evidence in determining the focus of the observation. The observer will seek evidence to assess proficiency on the targeted lesson elements. Observer may also observe other issues and address them in the post-observation conference. Observations are recorded using Form 2B.

Form 3: Teacher Post-Observation Self Assessment Tool

The teacher conducts a post-observation self-assessment of the targeted elements using Form 3 and shares it with the observer electronically prior to the post-observation conference. During the post-observation conference, the teacher and observer meet to discuss the lesson. The observer also shares the ratings based on the evidence observed during the observation. The observer and teacher share insights into the events that occurred during the observation and work toward agreement regarding teacher's rating for the elements observed. Specific sections of the observation instrument may be discussed.

The self-assessment forms and observation instruments can be found in Appendix E and Appendix H. (I.1.b) (I.1.c)

Annual Evaluation of First Year Teachers

The process for evaluating teachers in their first year of the teaching profession includes all the elements described in the previous section of this document and aligns with the statutory requirement of a minimum of two formal observations by a trained supervisor, as shown in Table 3. (II.5) Ongoing feedback and support from the supervisor is provided through professional conversations, classroom walk-through observations, formal observations, and a final performance assessment. The observation tools and evaluation rubric used are not altered for beginning teachers; however, the instructional practice scoring and the ranges for student growth are modified as shown in Tables 1 and 2.

Beginning teachers are provided with additional support through the Accomplished Professional Practices for the Lee Educational System (APPLES) program, as shown in Table 5. This program was designed to assist first year teachers and, upon supervisor request, newly hired teachers with previous teaching experience. Within the first month of employment, a peer teacher is assigned. Throughout the first year, a minimum of three formative observations are conducted by the peer teacher. Each of these observations includes pre and post-observation conferences between the teacher and the peer teacher. The peer teacher has regular meetings with the teacher and reviews student data gathered from formative and summative assessments to assist the teacher in guiding instruction based on data analysis. At the end of the year, the supervisor either verifies that the teacher successfully completed the program or requests that additional assistance continue to be provided in the following year.

The district is in the process of reviewing and revising the APPLES program to ensure that it is aligned with the new teacher evaluation system, the new FEAPs, and the requirements of Race to the Top.

Table 5. Summary of Additional Assistance Provided to First Year Teachers

Action	Timeframe
Peer teacher is assigned to teachers through the APPLES program	August
Beginning teacher completes self-assessment to determine level of ability with FEAPs	August
First formative observation is completed by peer teacher	September – October
Individual Professional Development Plan is completed with supervisor	November
Second formative observation is completed by peer teacher	December – January
Third formative observation is completed by peer teacher	February – April
APPLES program completion is verified or continuance is requested by supervisor	May

Annual Evaluation of Teachers Prior to a Milestone Event

In determining the final performance rating, the district has identified two levels of teachers: The Beginning Teacher with 0-3 years of experience and the Experienced Teacher, with 4 or more years of experience. The transition between the two levels has been identified as a milestone career event (II.7.a).

The annual evaluation for teachers in the year prior to a milestone event will take all the elements of a regular annual evaluation and add an additional metric. (II.6.a-b) This additional metric will apply to teachers in their third year of the teaching profession (II.6.b) and will take the form of peer review. (III.16.a-d) The process and the timeline for development and implementation of the additional metric is described below (II.6.d).

Peer reviewers will be selected from a pre-qualified pool of mentor teachers. The University Collaboration Team is currently working on identifying the qualifications to be a mentor teacher. The team's work will culminate in an application and selection process. The district will begin the implementation of this process during the 2011-2012 school year, allowing for the selection and training of peer reviewers to begin next summer. Peer reviewers will receive the same evaluation training as new administrators. (III.16.d). Peer reviewers will use the same observation tools and evaluation rubric as supervisors and the results of peer review will account for 25% of the instructional practice score, as shown in Table 2. The annual evaluation timeline for peer review is outlined in Table 6.

Table 6. Evaluation Timeline for Peer Review Metric

September	First planning conference with teacher
October - November	Complete initial formative observations Establish follow-up conference/communications
January - February	Mid-Year review to determine progress on goals/expectations Continue conference/communications feedback loop
March - April	Final performance evaluations are completed Follow-up conference/communications

Teaching Fields that Require Special Procedures or Criteria

Administrators from the departments of Curriculum and Staff Development, Exceptional Student Education, Human Resources, and Accountability, Research and Continuous Improvement formed an Assessment and Evaluation Committee. One of the tasks of the committee was to review the proposed evaluation system, Race to the Top requirements, and statute in order to identify teaching fields that need special procedures or criteria (III.11.a). The fields and impacted personnel identified are listed in Table 7. (III.11.b) Special procedures will also be required for teachers on leave, teachers hired after May 1st, and teachers transferring between locations and/or fields during the school year.

Table 7. Fields Requiring Special Procedures or Criteria

Personnel Impacted	Fields Identified
School Based Non-Classroom Instructional Personnel	Teachers on Assignment Guidance Counselors Media Specialists Academic Area Coaches (*e.g.* Reading Coaches) Instructional Technology Specialists ESOL and ESE Resource Teachers Athletic Directors Occupational Specialists IB Coordinators Behavior Specialists Psychologists
District Based Non-Classroom Instructional Personnel	Teachers on Assignment Professional Development Resource Teachers Curriculum Master Teachers Academic Area Coaches (*e.g.* Reading Coaches) Hospital Homebound Teachers Migrant Teachers Virtual School Teachers Staffing Specialists Speech Language Pathologists Social Workers Behavior Specialists Psychologists School Nurses
Classroom Teachers	Pre-Kindergarten Buckingham/Royal Palm Teachers DJJ Teachers ALC Teachers High Tech Teachers Other fields where performance-based assessment would be more appropriate (*e.g.* Band, Orchestra, Art, American Sign Language)

Amending Final Performance Ratings

The district will put procedures in place for amending evaluations based on receipt of additional assessment data within 90 days after the close of the school year. (III.19) The district will identify teachers impacted by the additional data and amend the student growth portion of the evaluation accordingly. Notification of the amendment will be provided to the

impacted teachers and their supervisors. If the amendment changes the rating received, a meeting between the supervisor and teacher will be required. The District will inform teachers of the possible implications of failing to meet the performance evaluation ratings and their continued employment status with the District in the language of the teacher's contract between the District and the teacher. In addition, if the employee is a classroom teacher, the parent of any student who is assigned to that teacher will be notified accordingly and pursuant to the requirements of law.

IMPLEMENTATION AND SYSTEM EVALUATION

Within the first sixty days of the teacher's contract year and prior to preparing the formal written report of a required teacher evaluation, each teacher will be informed of the criteria and the procedures to be used in his or her formal observations and evaluation. Supervisors will be responsible for providing this information to each teacher in their school or department location. (III.13)

The District will ensure that the same core of effective practices is used by all who are conducting evaluations through (a) district-wide implementation of the evaluation system; (b) district-wide use of the forms and tools developed in alignment with the evaluation rubric and the Florida Educator Accomplished Practices; and (c)through the training and monitoring systems described below. (I.1.e)

Initial Evaluator Training

Persons assigned to observe and/or evaluate instructional personnel will be required to complete a comprehensive training on the District's Teacher Evaluation System prior to involvement in any formal observation or evaluation activities. New administrators and peer teachers are examples of persons typically involved in initial evaluator training. Participants in this training will become proficient in the District's Teacher Evaluation System to include the use of all data collection forms, and observation and evaluation instruments described in this document. All participants will be required to complete and receive a passing score on an assessment of their skills in using the system prior to being allowed to conduct formal observations and evaluations. This assessment is designed to ensure inter-rater reliability and consistency of evaluation/observation practices and procedures district-wide. (III.12.a)

Ongoing Evaluator Training

All personnel required to observe and/or evaluate instructional personnel will be required to complete refresher training on the District's Teacher Evaluation System on an annual basis. This refresher is designed to maintain inter-rater reliability and to keep staff updated regarding any changes or revisions to the system and/or evaluation/observation practices and procedures. (III.12.b)

Annual System Review and Monitoring Evaluator Performance

The District previously conducted an analysis of the correlation between the current evaluation instrument and student achievement and found that little to no correlation exists. The already developed process for analysis will be used to evaluate the effectiveness of the new Teacher Evaluation System in supporting improvements in instruction and student learning. The goal is to align student achievement results with the evaluation instrument, making the evaluation instrument an accurate predictor of performance. (III.15.b)

Following the completion of the annual evaluation (typically in May) for all instructional personnel, the outcomes will be analyzed by staff from Human Resources and Accountability, Research and Continuous Improvement (May/June). This analysis will show evaluation and observation trends and may also be used to identify opportunities for improvement within the evaluation system or the procedures involved in its implementation, including revisions to the rubric and/or indicators. Special emphasis will be placed on district-wide consistency and inter-rater reliability. Results from this analysis will be shared with the Teacher Evaluation Task Force, an ongoing committee comprised of teacher, union representatives, and school and district-based administrators. This committee, convened three years ago, is charged with making recommendations and revisions to the Teacher Evaluation System, which would occur on an annual basis at a minimum. These recommendations and revisions would be implemented for the following school year (August), thereby ensuring a cycle of continuous improvement (II.4.b) (III.15.a)

In addition, the District continues to regularly meet with parent groups for the purposes of gathering input regarding the teacher evaluation system. For example, District Staff met with the District Advisory Committee, the Quality and Continuous Improvement Advisory Committee, the Curriculum Committee composed of parents, community members, district teachers and administrators with this expressed purpose in mind. This ongoing process will provide parent and community input into the evaluation system on a continual basis. (III.14.a)

The annual review of evaluation results for consistency and inter-rater reliability will also be part of the process used to monitor evaluator performance. The District will use the data to identify evaluators in need of further training and/or calibration. (III.12.c) Additionally, the District will review observation records to ensure that evaluators are using the system in the manner outlined in this document.

System Integration

The Teacher Evaluation System allows administrators to evaluate observation and evaluation results on a school-wide or district-wide basis. This monitoring will allow for the identification of trends which will help drive decisions around professional development and related training. Any areas of deficiency or in need of improvement identified in this manner would be targeted by a school in the School Improvement Plan. The school would then focus strategies for improvement to include Professional Development opportunities to meet these identified needs. Similarly, the District

would identify district-wide trends for incorporation in the District's Strategic Plan and would implement district-wide initiatives to meet these identified needs. (III.9.a)

The process for this level of integration would involve school staff reviewing evaluation and observation results on an annual basis. This event would occur directly following the completion of the annual performance assessment for all staff. School-wide trends would be identified for possible incorporation into the School Improvement Plan. The principal would share data collected from this process with the School Advisory Committee (SAC) and work with the SAC to incorporate goals and strategies to meet the areas identified by the data analysis of the Teacher Evaluation System results. A similar process would also occur at the District level. The Board and the District Advisory Committee comprised of parents and community members would be involved in the decision-making process regarding how to incorporate the evaluation results into goals and strategies of the Strategic Plan. (III.9.b)

THE ADMINISTRATOR EVALUATION

The district's existing evaluation rubrics for principals and assistant principals will be used for the 2011-2012 school year. The rubric for principals consists of six parts: 1. Professional Measures, 2. Unit and Individual Goals, 3. Instructional Leadership Practices, 4. Personnel Practices, 5. Financial Practices, and 6. Business Practices. The rubric for assistant principals consists of two parts: 1. Professional Measures, and 2. Units and Individual Goals. For school-based administrators, including those with less than 3 years of available data, these rubrics will be used as the basis for the administrative practice score, which will account for 50% of the final performance rating. The other 50% will be determined based on student growth, using the state-adopted growth measures for courses associated with FCAT. The list of student assessments for each level can be found in Table 8.

Table 8. Student Assessments for Use in 2011-12 for Administrator Ratings

Elementary/Middle Administrators (including K-8)	
School-Wide FCAT Reading (25%)	School-Wide FCAT Math (25%)
High School Administrators	
School-Wide FCAT Reading (30%)	School-Wide Algebra EOC and Geometry EOC (20%)

The Final Performance Rating

The final performance rating is calculated using a point system with total scores ranging from 0 to 6. A maximum of 3 points can be earned through the student growth measurement. An additional 3 points can be earned through the observation of administrative practice. In both cases, a rating of Highly Effective is valued at 3 points; Effective is valued at 2; Needs Improvement is valued at 1; and Unsatisfactory is valued at 0. An administrator receiving Unsatisfactory in either the student growth or the instructional practice portion of the evaluation will receive a final performance rating of Unsatisfactory.

Points for school-wide student growth will be assigned using a five step process. First, the grade level scores for the assessments described in Table 8 will be aggregated, resulting in a school-wide score for each type of assessment. These scores will then be weighted based on the percentages shown in Table 8. Next, like with the teacher evaluation system, a confidence band around each administrator's school-wide VAM score will be calculated. This will allow the district to be 95% certain that an administrator's score falls within one of three bands: VAM score below 0, VAM score crosses 0, or VAM score is above 0. Administrators whose scores fall in the band entirely below 0 will be rated as Unsatisfactory. Administrators whose scores fall in the band entirely above 0 will be rated as Highly Effective and receive 3 points toward student growth. For administrators whose VAM scores fall in the band crossing zero, a fourth step will be applied to determine the points assigned for student growth.

If an administrator's confidence band crosses zero, it means that the VAM score could be positive or negative. Administrators in this band will be rated either Effective or Developing/Needs Improvement in the area of student growth. In order to determine which rating an administrator will receive, the district will look at the percentage of students assigned to the school that met expected gains. Administrators with 30% or more of their students meeting expectations will be rated as effective and receive 2 points toward student. If less than 30% of their students meet expectations, administrators will be rated as Developing or Needs Improvement and receive 1 point toward student growth, as shown in Table 9. The district will follow these two steps for each year of assessment data. For administrators with more than one year of data, a fourth step will be taken.

Table 9: Assigning Points for Student Growth for Each Year of Data

Score (0-3) for Each Year of Data	Criteria
3 (Highly Effective)	95% Confident VAM score above 0
2 (Effective)	95% Confident VAM score crosses 0 **AND** Students Meeting Expectations ≥30%
1 (Developing/ Needs Improvement)	95% Confident VAM score crosses 0 **AND** Students Meeting Expectations <30%
0 (Unsatisfactory)	95% Confident VAM score below 0

In cases where three years of data are available, the average of the points received toward student growth for each of those three years will be calculated. Where two years of data are available, the average for those two years will be calculated. In both cases, the most recent year will be weighted by counting those points twice.

The overall points received for student growth will be determined by comparing the average points to a range. Administrators whose average is within the range of 2.5 – 3, will be rated as Highly Effective and receive 3 points toward the student growth portion of the final performance rating; an average within the range of 1.5 – 2.49 will result in a rating of Effective and 2 points for student growth; an average within the range of 0.51 – 1.49 will result in a rating of Needs Improvement or Developing and 1 point for student growth; and an average within 0 – 0.50 will result in a rating of Unsatisfactory. Additionally, administrators whose scores, prior to being averaged, were Unsatisfactory in the current year and also Unsatisfactory in any prior year will receive a rating of Unsatisfactory.

Points for administrative practice will be assigned by counting the rubric ratings as determined through the final performance evaluation. Principals will receive ratings in each of the six parts. Assistant principals will receive ratings in each of the two parts. The assigned score for administrative practice is based on a count of each type of rating received. The number of ratings required to receive a particular score is shown in Table 10.

Table 10. Assigning Points for Administrative Practice

Score (0-3)	Principals	Assistant Principals
3 (Highly Effective)	All ratings are *Frequently Exceeds* or *Consistently Exceeds Expectations* in Part 1 **AND** No ratings of *Not Achieved* in Part 2 **AND** No ratings of *Below Expectations* in Parts 3-6	All ratings are *Frequently Exceeds* or *Consistently Exceeds Expectations* in Part 1 **AND** No ratings of *Not Achieved* in Part 2
2 (Effective)	No ratings below *Meets Expectations* in Part 1 **AND** No more than 1 rating of *Not Achieved* in Part 2 **AND** No ratings of *Below Expectations* in Parts 3-6	No ratings below *Meets Expectations* in Part 1 **AND** No more than 1 rating of *Not Achieved* in Part 2
1 (Developing)	1 rating below *Meets Expectations* in Part 1 **OR** 2 ratings of *Not Achieved* in Part 2 **OR** 1 rating of *Below Expectations* in Parts 3-6	1 rating below *Meets Expectations* in Part 1 **OR** 2 ratings of *Not Achieved* in Part 2
0 (Unsatisfactory)	2 or more ratings below *Meets Expectations* in Part 1 **OR** 3 ratings of *Not Achieved* in Part 2 **OR** 2 or more ratings of *Below Expectations* in Parts 3-6	2 or more ratings below *Meets Expectations* in Part 1 **OR** 3 ratings of Not Achieved in Part 2

The points earned for the student growth measurement are added to the points earned for administrative practice and the final performance rating is assigned based on a range. The range is the same for all school based administrators. A total score of 2 results in a final performance rating of Needs Improvement; 3-4 results in Effective; and 5-6 is Highly Effective. Administrators that receive 0 points in either the administrative practice or the student growth portions of the evaluation will receive a final performance rating of Unsatisfactory.

The final performance rating is assigned by the Division of Human Resources and Employee Relations. Supervisors enter the results of the final performance evaluation into the employee's record electronically. The performance management system will calculate the points earned for administrative practice and add those to the points earned for the student growth measure in order to assign a final rating. The evaluation rubric and scoring system used to define and assign an employee's final evaluation rating can be found in Appendix G.

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Memorandum of Understanding, signed by the superintendent and local bargaining unit representative, verifying that the evaluation rubric submitted has been agreed to (pending review by the DOE) in accordance with the district's collective bargaining process. (II.4.c)

MOU available at http://learn.leeschools.net/dept/hr/teacher_eval_resources.htm

The District's timeline for the development/selection of student assessments used for evaluation for each subject and grade level (I.2.b) and for incorporating assessments for each subject and grade level into the evaluation (I.2.b).

Assessment Development Timeline for FY11			
Course	Incorporate into Evaluation System	Course	Incorporate into Evaluation System
Elementary School		*High School, Continued*	
Math KG	FY14	Algebra 1	N/A: Formative
Math 1st	FY14	Algebra 1b	N/A: Formative
Math 2nd	FY14	Geometry	N/A: Formative
Math 3rd	N/A: Formative	Geometry Honors	N/A: Formative
Math 4th	N/A: Formative	Algebra 2	FY13
Math 5th	N/A: Formative	Algebra 2 Honors	FY14
Science 3rd	N/A: Formative	Liberal Arts Math	FY14
Science 4th	N/A: Formative	PreCalculus	FY14
Science 5th	FY14	Algebra 1a	N/A: Formative
Reading 1st	N/A: Formative	Spanish 1	FY14
Reading 2nd	N/A: Formative	Spanish 2	FY14
Reading 3rd	N/A: Formative	French 1	FY14
Reading 4th	N/A: Formative	French 2	FY14
Reading 5th	N/A: Formative	HOPE	FY14
Middle School		HOPE PE Variation	FY14
MJ Language Arts 1	FY13	Team Sports 1	FY14
MJ Language Arts 1 Adv	FY13	Team Sports 2	FY14
MJ Language Arts 2	FY13	Dr Education	FY14
MJ Language Arts 2 Adv	FY13	Beg Weight Training	FY14
MJ Language Arts 3	FY13	Intensive Reading W	N/A: Formative
MJ Language Arts 3 Adv	FY13	Intensive Reading X	N/A: Formative
MJ Math 1	N/A: Formative	Intensive Reading Y	N/A: Formative
MJ Math 1 Adv	N/A: Formative	Intensive Reading Z	N/A: Formative
MJ Math 2	N/A: Formative	World History	FY13
MJ Math 2 Adv	N/A: Formative	World History Honors	FY14
MJ Math 3	N/A: Formative	World Cult Geography	FY13
MJ Math 3 Adv	N/A: Formative	World Cult Geography Honors	FY14
Intensive Math 6th	N/A: Formative	Economics	FY13
Intensive Math 7th	N/A: Formative	Economics Honors	FY14
Intensive Math 8th	N/A: Formative	Am Government	FY13
Dev Reading 7th	N/A: Formative	Am Government Honors	FY14
Dev Reading 8th	N/A: Formative	Psychology	FY14
MJ World History	FY13	Am History	N/A: Formative
MJ World History Adv	FY13	Am History Honors	N/A: Formative
MJ World Geo	FY13	Integrated Sci 1	FY14
MJ World Geo Adv	FY13	Integrated Sci 2	FY14
MJ US History	FY13	Integrated Sci 3	FY14
MJ US History Adv	FY13	Biology	N/A: Formative
MJ Comp Sci 1	FY13	Biology Honors	N/A: Formative
MJ Comp Sci 1 Adv	FY13	Chemistry	FY14
MJ Comp Sci 2	FY13	Chemistry Honors	FY14
MJ Comp Sci 2 Adv	FY13	Physics	FY14
MJ Comp Sci 3	FY13	Physics Honors	FY14
MJ Comp Sci 3 Adv	FY13	Anat and Psy Honors	FY14
MS Comp Apps	FY14	Env Science	FY14
High School		Marine Sci Honors	FY14
English 1	FY13	Physical Science	FY14
English 1 Honors	FY13	Web Design	FY14
English 2	FY13	Digital Design	FY14
English 2 Honors	FY13	Intro to IT/CCC	FY14
English 3	FY13	Engineering	FY14
English 3 Honors	FY13	TV Production	FY14
English 4	FY13	Building Construction	FY14
English 4 Honors	FY13	Drafting	FY14
TAMS Algebra 1	N/A: Formative	Gaming and Prog Simulation	FY14
Math for College Readiness	FY14		

The list of student assessments for each subject and grade level for use in 2011-12. (I.2.a)

Student Assessments for Use in 2011-12

Elementary: Non-Departmentalized	
Teaching Assignment	*Assessment for Evaluation Purposes*
Kindergarten (K)	FAIR/SAT-10 Reading
First Grade (1)	SAT-10 Reading
Second Grade (2)	SAT-10 Reading
Third Grade (3)	SAT-10 Reading/FCAT Reading
Fourth Grade (4)	FCAT Reading
Fifth Grade (5)	FCAT Reading
Other (K-5), *incl. non-classroom instructional*	FCAT Reading based on Assigned Students **OR** Grade-Level **OR** School-Wide

Elementary: Departmentalized	
Teaching Assignment	*Assessment for Evaluation Purposes*
Kindergarten (K)	FAIR/SAT-10 Reading
First Grade (1)	SAT-10 Reading
Second Grade (2)	SAT-10 Reading
Third Grade (3)	SAT-10 Reading/FCAT Reading or FCAT Math
Fourth Grade (4)	FCAT Reading or Math
Fifth Grade (5)	FCAT Reading, Math, or Science
Other (K-5), *incl. non-classroom instructional*	FCAT Reading based on Assigned Students **OR** Grade-Level **OR** School-Wide

Middle School	
Teaching Assignment	*Assessment for Evaluation Purposes*
Math Courses (6-8)	FCAT Math
Science Courses (8)	FCAT Science
Reading Courses (6-8)	FCAT Reading
Other (6-8), *incl. non-classroom instructional*	FCAT Reading based on Assigned Students **OR** Grade-Level **OR** School-Wide

High School	
Teaching Assignment	*Assessment for Evaluation Purposes*
Reading Courses (9-10)	FCAT Reading
Algebra 1 (1200310); Algebra 1 Honors (1200320); Algebra 1B (1200380); Pre-AICE Mathematics 1 (1209810); IB Middle Years Program – Algebra 1 Honors (1200390)	State EOC
Geometry (1206310); Geometry Honors (1206320) ; IB Middle Years Program Geometry Honors (1206810); Pre-AICE Mathematics 2 (120982	State EOC
Biology 1 (2000310); Biology 1 Honors (2000320); Pre-AICE Biology (2000322); Biology Technology (2000430); Biology 1 PreIB (2000800); IB Middle Years Program Biology Honors (2000850); Integrated Science 3 (2002440); Integrated Science 3 Honors (2002450)	State EOC
Other (9-12), *incl. non-classroom instructional*	FCAT Reading based on Assigned Students **OR** Grade-Level **OR** School-Wide

District Level Non-Classroom Instructional Personnel	
Non-Classroom Instructional Personnel	School-Wide **OR** District-Wide FCAT Reading, Math, or Science

APPENDIX D: CLASSROOM TEACHER EVALUATION RUBRIC

The evaluation rubric and scoring system used to define and assign an employee's final evaluation rating. (I.3.b) (II.5.e)

Full rubric available at http://learn.leeschools.net/dept/hr/teacher_eval_resources.htm

	Final Performance Rating Summary (Beginning Teacher)			
	Rating Count Summary for Instructional Practice *Domain 3 ratings counted twice to account for weighting.*			
School District of Lee County 2011-2012	Requires Action (Level0)	Developing (Level 1)	Accomplished (Level 2)	Exemplary (Level 3)
Domain 1: Planning and Preparation				
Domain 2: The Classroom Environment				
Domain 3: Instruction*				
Domain 4: Professional Responsibilities				
Total				

Final Performance Rating Determinants

Rating	Instructional Practice (X) *(Domain 3 ratings counted twice to account for weighting. Total ratings = 25)*	Student Growth (Y)	Final Performance Score Range (X+Y)
Highly effective (3)	At least 16 ratings at Level 3 No ratings at Level 1 or 0	2.5 – 3.0	5 - 6
Effective (2)	At least 20 ratings at Level 2 or 3 No ratings at Level 0	1.5 – 2.49	3 - 4
Developing (1)	No more than 2 ratings at Level 0	0.51 – 1.49	2
Unsatisfactory (0)	3 or more ratings at Level 0	0 – 0.50	Unsatisfactory in Instructional Practice **OR** Student Growth

Final Performance Calculation

Instructional Practice Score	X
Student Growth Score	Y
Final Performance Rating :	**(X +Y)**

SUPERVISOR COMMENTS AND/OR SUGGESTIONS:

Signature of Supervisor: _____   Date:_____

Signature of Teacher: _____   Date:_____

(My signature does not necessarily imply agreement with the assessment, but acknowledges that I have discussed it with the assessor.)

	Final Performance Rating Summary (Beginning Teacher Year 3)							
	Rating Count Summary for Instructional Practice *Domain 3 ratings counted twice to account for weighting.*							
School District of Lee County 2011-2012	Requires Action (Level 0)		Developing (Level 1)		Accomplished (Level 2)		Exemplary (Level 3)	
	Manager	Peer	Manager	Peer	Manager	Peer	Manager	Peer
Domain 1: Planning and Preparation								
Domain 2: The Classroom Environment								
Domain 3: Instruction*								
Domain 4: Professional Responsibilities								
Total								

Final Performance Rating Determinants

Rating	Instructional Practice (Manager+Peer)(X) *(Domain 3 ratings counted twice to account for weighting. Total ratings = 25)*	Student Growth (Y)	Final Performance Score Range (X+Y)
Highly effective (3)	At least 32 ratings at Level 3 No ratings at Level 1 or 0	2.5 – 3.0	5 - 6
Effective (2)	At least 44 ratings at Level 2 or 3 No ratings at Level 0	1.5 – 2.49	3 - 4
Needs Improvement (1)	No more than 2 ratings at Level 0	0.51 – 1.49	2
Unsatisfactory (0)	3 or more ratings at Level 0	0 – 0.50	Unsatisfactory in Instructional Practice **OR** Student Growth

Final Performance Calculation

Instructional Practice Score		X
Student Growth Score		Y
Final Performance Rating :		**(X +Y)**

SUPERVISOR COMMENTS AND/OR SUGGESTIONS:

Signature of Supervisor: _____ Date:_____

Signature of Teacher: _____ Date:_____

(My signature does not necessarily imply agreement with the assessment, but acknowledges that I have discussed it with the assessor.)

School District of Lee County	Final Performance Rating Summary (Experienced Teacher)			
	Rating Count Summary for Instructional Practice *Domain 3 ratings counted twice to account for weighting.*			
School District of Lee County 2011-2012	Requires Action (Level 0)	Developing (Level 1)	Accomplished (Level 2)	Exemplary (Level 3)
Domain 1: Planning and Preparation				
Domain 2: The Classroom Environment				
Domain 3: Instruction*				
Domain 4: Professional Responsibilities				
Total				

Final Performance Rating Determinants			
Rating	**Instructional Practice (X)** *(Domain 3 ratings counted twice to account for weighting. Total ratings = 25)*	**Student Growth (Y)**	**Final Performance Score Range (X+Y)**
Highly effective (3)	At least 19 ratings at Level 3 No ratings at Level 1 or 0	2.5 – 3.0	5 - 6
Effective (2)	At least 22 ratings at Level 2 or 3 No ratings at Level 0	1.5 – 2.49	3 - 4
Needs Improvement (1)	No more than 1 rating at Level 0	0.51 – 1.49	2
Unsatisfactory (0)	2 or more ratings at Level 0	0 – 0.50	Unsatisfactory in Instructional Practice **OR** Student Growth

Final Performance Calculation	
Instructional Practice Score	X
Student Growth Score	Y
Final Performance Rating :	**(X +Y)**

SUPERVISOR COMMENTS AND/OR SUGGESTIONS:

Signature of Supervisor: _____   Date:_____

Signature of Teacher: _____   Date:_____

(My signature does not necessarily imply agreement with the assessment, but acknowledges that I have discussed it with the assessor.)

APPENDIX E: SELF ASSESSMENT AND OBSERVATION FORMS

Forms for teacher self-assessment and observation instruments with indicators of effective practices (I.1.b) including connection between observation instruments and the FEAPs (I.1.c).

Forms available at http://learn.leeschools.net/dept/hr/teacher_eval_resources.htm

Timeline for using evaluation results to inform individual professional development (III.10.b & c)

Timeline for Using Evaluation to Inform Individual Professional Development (PD)

The LEA will revise its professional development system to include the elements described in the Race to the Top grant, will utilize data from teachers' and principals' evaluations to plan and evaluate professional development, and will evaluate the effectiveness of professional development based on changes in practice and student outcomes.

A timetable for implementing the new elements into the professional development system for teachers and principals in the district.	
Deliverable	**Timeline**
Meet with Academic Services Division Team to identify elements needed for tracking and evaluating professional development	Quarter 3
Review existing Enterprise Learning Management (ELM) system for existing fields and functionality as they relate to professional development	Quarter 3
Create Customer Care Ticket detailing additional fields, screens, and functionality modifications needed for tracking and evaluating professional development	Quarter 4
Enterprise Resource Planning (ERP) Team develops screen and fields for ELM	Quarter 4
Academic Services Team and Curriculum Master Teachers identify initial trainings to target for evaluating professional development impact	Quarter 4
Identify instruments/rubrics (multiple measures) for determining the level of implementation of professional development	Year 2
Enter level of implementation into ELM system for targeted trainings	Year 2
Align and connect teachers fully implementing selected trainings with class schedules and specific students in database system	Year 2
Extract and compile district and state assessment data for targeted teachers and students as specified above	Year 2
Identify key training activities that correlate to increased student learning gains	Year 3
Review and update above processes each year	

A timetable for implementing the evaluation of professional development in the district.	
Deliverable	**Timeline**
Establish tentative timeline	Quarter 4
Research methods and approaches to evaluation of professional development	Quarter 4
Discuss and evaluate research	Quarter 4
Identify possible levels of implementation	Quarter 4
Identify possible measurement tools	Quarter 4
Seek input from other parties involved: teachers, administrators, and district staff as to methods of PD evaluation, measurement tools, etc.	Year 2
Decide on best methods for evaluation	Year 2
Collaborate with other departments in developing measurement instruments	Year 2
Circulate proposed evaluation tools for review	Year 2
Make necessary revisions	Year 2
Pilot the PD evaluation system	Year 3
Obtain feedback on evaluation system from all participants – teachers, administrators and district staff	Year 3
Review pilot results for correlation between PD levels of implementation, teacher feedback on PD and improved levels of student performance on learnings targeted by the PD	Year 3
Make necessary adjustments to evaluation system as necessary to achieve desired result of measuring the effectiveness of specific PD	Year 3
Implement PD evaluation system district-wide	Year 3
Review and update above processes each year	

The evaluation rubric and scoring system used to define and assign an employee's final evaluation rating.

THE SCHOOL DISTRICT OF LEE COUNTY
ADMINISTRATIVE PERFORMANCE ASSESSMENT INSTRUMENT
FORM A: (for Principals)

APPRAISAL INFORMATION

Name:	
School:	
Position: Select...	Months in This Position: 0
Date of Appraisal:	Apply to Fiscal Year: 12
Appraisal Period Start: July 1, 2011	Appraisal Period End: June 30, 2012
Evaluating Supervisor:	

SCHOOL DEMOGRAPHIC INFORMATION (IF APPLICABLE)

Total Student Enrollment:	Percentage Eligible for Free or Reduced Price Lunch:	Minority Percentage:	ESOL Percentage:
	%	%	%
ESE Percentage (excluding gifted):	ESE Percentage (part-time gifted only):	ESE Percentage (full-time gifted only):	Student Mobility:
%	%	%	%
Student Stability:	ESEA Title I School or Program:	Current School Grade:	AYP Status:
%	Select...		Select...

Special Notes or Considerations Regarding School Demographics (if any):

PERFORMANCE APPRAISAL GUIDELINES

This performance appraisal is an important tool in the School District of Lee County's overall performance management process and employee development. The supervisor should appraise the employee's overall performance primarily on whether the employee's performance produced the desired results in each of the key functions of the job during this appraisal period. Descriptive terms, such as improving, consistent, and declining, are key in recording accurate performance records.

This appraisal instrument is used to document assessment in several different dimensions of administration and leadership:

Professional Responsibilities: Generalized competencies in modern management, leadership, and quality assurance that employees must demonstrate to perform successfully in large and growing public organization. Assessment for professional responsibilities includes **Part 1: Professional Measures.**

Personal Responsibilities: Specific competencies, goals, or commitments that employees have identified in collaboration with the evaluating supervisor. These responsibilities are unique to each employee and are likely to vary from year to year. Assessment of personal responsibilities includes **Part 2: Performance Measures.**

General Responsibilities: Competencies and/or commitments that employees must demonstrate to perform their jobs. The responsibilities may be weighted. Some areas will have a greater impact than others and should be considered accordingly. These areas are assessed based on standards developed by the Department responsible for monitoring performance. Assessments for general responsibilities include
Part 3: Accountability and Compliance Measures for Instructional Leadership Practices, Part 4: Accountability and Compliance Measures for Personnel Practices, Part 5: Accountability and Compliance Measures for Financial Practices, and **Part 6: Accountability and Compliances Measures for Business Practices.**

Part 1: Professional Measures

Assessment ratings for professional measures are based on the following scale:

Indicators	Rating
Consistently Exceeds Expectations: The employee consistently exceeds all the expectations for responsibilities and objectives, skills, abilities, and commitment required for the job. The employee possesses superior knowledge of major aspects of the total job and has had experience in each of these areas. This rating is used as special recognition for extraordinary accomplishments that have significant impact on the organization.	**4**
Frequently Exceeds Expectations: The employee achieves and frequently exceeds expectations for responsibilities and objectives. Demonstrates necessary skills, abilities, and commitment required for the job. The employee possesses a working knowledge of the major aspects of the total job and has had experience in each of these areas. This rating is for unusually effective employees who perform above what is normally expected.	**3**
Meets Expectations: The employee generally meets established expectations for responsibilities and objectives. Demonstrates required skills, abilities, and commitment for the job. The employee possesses some knowledge of the major aspects of the job and has had experience in many of these areas. This rating describes the employee whose overall performance is satisfactory, and any minor areas where performance should have been better were counterbalanced by performance beyond expectations.	**2**
Partially Meets Expectations: The employee does not always meet all expectations for responsibilities and objectives identified for the job. The employee possesses most necessary knowledge, skills, abilities required for the job, but additional training or commitment is required. This rating describes the employee who meets only the very minimum position requirements and whose performance could be improved.	**1**
Below Expectations: The employee does not meet expectations for responsibilities and objectives. Does not demonstrate necessary knowledge, skills, abilities, and commitment required for the total job. This rating describes the employee who has not kept pace with changing requirements, whose successes have been only occasional, or whose performance has been deteriorating. Immediate and substantial improvement is needed in order to have continued employment. A performance improvement plan needs to be developed.	**0**

EXPECTATION DESCRIPTION	RATING	
Leadership		
1. Develops, implements, and/or supports a unit vision and mission.	☐ Focus Area	
2. Models collaborative leadership and effectively involves stakeholders.	☐ Focus Area	
3. Directs thoughtful, appropriate, and effective change efforts.	☐ Focus Area	
4. Establishes methods to recruit qualified staff.	☐ Focus Area	
Professional Orientation		
5. Demonstrates commitment to improvement and collaboration.	☐ Focus Area	
6. Models and maintains a level of respect by and for colleagues.	☐ Focus Area	
7. Maintains currency in related areas of professional knowledge and skills.	☐ Focus Area	
Communication		
8. Communicates appropriately and effectively to colleagues and coworkers.	☐ Focus Area	
9. Communicates appropriately and effectively to customers.	☐ Focus Area	
10. Communicates effectively in varied means, methods, and media.	☐ Focus Area	
Information and Analysis		
11. Identifies and collects data for high-quality decision-making.	☐ Focus Area	
12. Analyzes and interprets data to improve plans, processes, and systems.	☐ Focus Area	
13. Disseminates timely and accurate data to stakeholders appropriately.	☐ Focus Area	
Strategic Planning and Management		
14. Implements and/or supports an effective strategic planning processes.	☐ Focus Area	
15. Works toward achieving unit goals to support and align with district goals.	☐ Focus Area	
16. Allocates and leverages resources effectively.	☐ Focus Area	
17. Develops and implements effective strategies used in the retention of staff members.	☐ Focus Area	
Customer Focus		
18. Strives to develop positive relationships with all customers.	☐ Focus Area	
19. Establishes processes and methods to respond to customer requirements.	☐ Focus Area	
20. Establishes processes to measure customer needs and levels of satisfaction.	☐ Focus Area	
Professional Measures Subtotal	0	

Comments:

Part 2: Unit and Individual Goals

Expectations selected to be accomplished by a particular date. They are based on goals and objectives identified by a principal or department manager. They have been identified as being necessary to enhance the functional operations of the individual's area of responsibility for the upcoming performance cycle. Objectives must be measurable and must be agreed to by the administrator's evaluator.

It is recommended that the evaluating supervisor and the employee choose two goals aligned with the Individual School Improvement Plan or Department Deployment Plan. The third goal should be an individual goal aligned with the Strategic Plan.

Assessment ratings for unit and individual goals are based on the following scale:

Indicators	Rating
Fully Achieved: The goal was fully realized in every meaningful way and by all objective measures. This rating is used to identify highly-effective use of goal-setting and goal attainment processes.	**3**
Substantially Achieved: The goal was largely realized. The objective measures may have technically fallen short of what was intended, but there is ample evidence of substantial improvement. This rating is used to identify effective use of goal-setting and goal attainment processes.	**2**
Partially Achieved: There is evidence of improvement, but objective measures are short of what was intended. Goal-setting and goal attainment processes were used, but with limited success.	**1**
Not Achieved: There is no evidence of improvement, and objective measures are unchanged or worsened. This rating is used to identify ineffective or incomplete goal-setting and goal attainment processes.	**0**

GOAL	MEASURABLE OBJECTIVE	MEASURED RESULTS	APPRAISAL RATING
1			
2			
3			
Unit and Individual Goals Subtotal			0

Comments:

Part 3: Accountability and Compliance Measures for Instructional Leadership Practice

INSTRUCTIONAL LEADERSHIP PRACTICES	PERFORMANCE STANDARD *Typical Indicators (documentation)*	APPRAISAL RATING *Meets requirement = 1* *Below expectation = 0*
Literacy Leadership	Evidence of Reading Leadership Team (membership, agenda, minutes)	
Literacy Leadership	Reading in the content area instruction occurring (lesson plans)	
Literacy Leadership	Timely submission of state-required monitoring forms	
Coaching for Instructional Improvement	Four walk-throughs per classroom teacher (Documentation such as CWT Web Report or cards)	
Professional Development	Evidence of training for instructional staff in research-based instructional practices (Inservice records)	
Instructional Leadership Practices Subtotal		0

Comments:

Part 4: Accountability and Compliance Measures for Personnel Practices

PERSONNEL PRACTICES	PERFORMANCE STANDARD *Typical Indicators*	APPRAISAL RATING *Yes = 1 No = 0*
Human Resource Management	Evaluations/Personnel Action Forms are properly conducted and documented in accordance within established timelines and procedure.	0
Responds to Poor Performance	Effectively targets and provides coaching, intensive assistance when necessary. Effectively documents performance concerns.	0
Contract Compliance	Adheres to provisions of the collective bargaining agreements. Responds to employee contractual concerns in an appropriate and timely manner.	0
Employee skill development	Effective staff training is provided.	0
Personnel Practices Subtotal		0
Comments:		

Part 5: Accountability and Compliance Measures for Financial Practices

FINANCIAL PRACTICES	PERFORMANCE STANDARD *Typical Indicators*					APPRAISAL RATING *Meet Expectations = 1* *Below Expectations = 0*
Property management	*Loss Report*	$0.00	*Items Missing 2 Years*	0	*Items Missing 1 Year*	0	0
Internal audit	*Findings*	0	*Repeat Findings*	0	*Audit Rating*		0
Financial Practices Subtotal						0
Comments:						

Part 6: Accountability and Compliance Measures for Business Practices

BUSINESS PRACTICES	PERFORMANCE STANDARD *Typical Indicators*	APPRAISAL RATING *Meet Expectations = 1* *Below Expectations = 0*
District budget audit	Budgets will balance with a positive reserve.	0
Budget operations	Follows proper budgetary procedures and guidelines.	0
Program compliance	Planning is in compliance and on time (*e.g.* SIP, IEP, SAI, PDP).	0
Program planning	Planning is linked to identified needs (*e.g*., SBIP, quality improvement).	0
Stewardship	Building, grounds, and equipment are well-maintained.	0
Workplace safety, security, and health quality assurance	Maintains clean, safe, secure, and healthy environment. Complies with SREF and IAQ requirements, if applicable.	0
Business Practices Subtotal		0
Comments:		

**Administrative Performance Assessment Summary
(Principals)**

Administrative Practice Rating Summary				
Below Expectations (Level 0)	Partially Meets Expectations (Level 1)	Meets Expectations (Level 2)	Frequently Exceeds Expectations (Level 3)	Consistently Exceeds Expectations (Level 4)
Count	*Count*	*Count*	*Count*	*Count*
Part 1: Professional Measures				

	Not Achieved (Level 0)	Partially Achieved (Level 1)	Substantially Achieved (Level 2)	Achieved (Level 3)
	Count	*Count*	*Count*	*Count*
Part 2: Unit and Individual Goals				

Accountability &Compliance Measures	Below Expectations (Level 0)	Meets Expectations (Level 1)
Part 3: Instructional Leadership Practices	*Count*	*Count*
Part 4: Personnel Practices		
Part 5: Financial Practices		
Part 6: Business Practices		

Final Performance Rating Determinants			
Rating	**Administrative Practice Score(X)**	**Student Growth Score (Y)**	**Final Performance Score Range (X+Y)**
Highly effective (3)	Only Level 3 and Level 4 Ratings in Part 1 **AND** No ratings at Level 0 in Parts 2-6	2.5 – 3.0	5-6
Effective (2)	No rating below Level 2 in Part 1 **AND** No more than 1 rating at Level 0 in Part 2 **AND** No ratings at Level 0 in Parts 3-6	1.5 – 2.49	3-4
Needs Improvement (1)	1 rating below Level 2 in Part 1 **OR** 2 ratings at Level 0 in Part 2 **OR** 1 rating at Level 0 in Parts 3-6	0.51 – 1.49	2
Unsatisfactory (0)	2 or more ratings below Level 2 in Part 1 **OR** 3 ratings at Level 0 in Part 2 **OR** 2 or more ratings at Level 0 in Parts 3-6	0 – 0.50	Unsatisfactory in Student Growth **OR** Administrative Practice

ASSESSOR'S SIGNATURE   **DATE**   **ASSESSEE'S SIGNATURE**   **DATE**

My signature does not necessarily imply agreement with the assessment, but acknowledges that I have discussed it with the assessor.

THE SCHOOL DISTRICT OF LEE COUNTY

ADMINISTRATIVE PERFORMANCE ASSESSMENT INSTRUMENT

FORM B: (for Assistant Principals)

APPRAISAL INFORMATION

Name:	
School:	
Position: Assistant Principal	Months in This Position: 0
Date of Appraisal:	Apply to Fiscal Year: 12
Appraisal Period Start: July 1, 2011	Appraisal Period End: June 30, 2012
Evaluating Supervisor:	

SCHOOL DEMOGRAPHIC INFORMATION (IF APPLICABLE)

Total Student Enrollment:	Percentage Eligible for Free or Reduced Price Lunch:	Minority Percentage:	ESOL Percentage:
	%	%	%
ESE Percentage (excluding gifted):	ESE Percentage (part-time gifted only):	ESE Percentage (full-time gifted only):	Student Mobility:
%	%	%	%
Student Stability:	ESEA Title I School or Program:	Current School Grade:	AYP Status:
%	Select...		Select...

Special Notes or Considerations Regarding School Demographics (if any):

PERFORMANCE APPRAISAL GUIDELINES

This performance appraisal is an important tool in the School District of Lee County's overall performance management process and employee development. The supervisor should appraise the employee's overall performance primarily on whether the employee's performance produced the desired results in each of the key functions of the job during this appraisal period. Descriptive terms, such as improving, consistent, and declining, are key in recording accurate performance records.

This appraisal instrument is used to document assessment in several different dimensions of administration and leadership:

Professional Responsibilities: Generalized competencies in modern management, leadership, and quality assurance that employees must demonstrate to perform successfully in large and growing public organization. Assessment for professional responsibilities includes **Part 1: Professional Measures.**

Personal Responsibilities: Specific competencies, goals, or commitments that employees have identified in collaboration with the evaluating supervisor. These responsibilities are unique to each employee and are likely to vary from year to year. Assessment of personal responsibilities includes **Part 2: Performance Measures.**

Part 1: Professional Measures

Assessment ratings for professional measures are based on the following scale:

Indicators	Rating
Consistently Exceeds Expectations: The employee consistently exceeds all the expectations for responsibilities and objectives, skills, abilities, and commitment required for the job. The employee possesses superior knowledge of major aspects of the total job and has had experience in each of these areas. This rating is used as special recognition for extraordinary accomplishments that have significant impact on the organization.	**4**
Frequently Exceeds Expectations: The employee achieves and frequently exceeds expectations for responsibilities and objectives. Demonstrates necessary skills, abilities, and commitment required for the job. The employee possesses a working knowledge of the major aspects of the total job and has had experience in each of these areas. This rating is for unusually effective employees who perform above what is normally expected.	**3**
Meets Expectations: The employee generally meets established expectations for responsibilities and objectives. Demonstrates required skills, abilities, and commitment for the job. The employee possesses some knowledge of the major aspects of the job and has had experience in many of these areas. This rating describes the employee whose overall performance is satisfactory, and any minor areas where performance should have been better were counterbalanced by performance beyond expectations.	**2**
Partially Meets Expectations: The employee does not always meet all expectations for responsibilities and objectives identified for the job. The employee possesses most necessary knowledge, skills, abilities required for the job, but additional training or commitment is required. This rating describes the employee who meets only the very minimum position requirements and whose performance could be improved.	**1**
Below Expectations: The employee does not meet expectations for responsibilities and objectives. Does not demonstrate necessary knowledge, skills, abilities, and commitment required for the total job. This rating describes the employee who has not kept pace with changing requirements, whose successes have been only occasional, or whose performance has been deteriorating. Immediate and substantial improvement is needed in order to have continued employment. A performance improvement plan needs to be developed.	**0**

EXPECTATION DESCRIPTION		RATING
Leadership		
21. Develops, implements, and/or supports a unit vision and mission.	☐ Focus Area	
22. Models collaborative leadership and effectively involves stakeholders.	☐ Focus Area	
23. Directs thoughtful, appropriate, and effective change efforts.	☐ Focus Area	
Professional Orientation		
24. Demonstrates commitment to improvement and collaboration.	☐ Focus Area	
25. Models and maintains a level of respect by and for colleagues.	☐ Focus Area	
26. Maintains currency in related areas of professional knowledge and skills.	☐ Focus Area	
Communication		
27. Communicates appropriately and effectively to colleagues and coworkers.	☐ Focus Area	
28. Communicates appropriately and effectively to customers.	☐ Focus Area	
29. Communicates effectively in varied means, methods, and media.	☐ Focus Area	
Information an Analysis		
30. Identifies and collects data for high-quality decision-making.	☐ Focus Area	
31. Analyzes and interprets data to improve plans, processes, and systems.	☐ Focus Area	
32. Disseminates tim ly and accurate data to stakeholders appropriately.	☐ Focus Area	
Strategic Planning and Management		
33. Implements and/or supports an effective strategic planning processes.	☐ Focus Area	
34. Work toward achieving unit goals to support and align with district goals.	☐ Focus Area	
35. Allocates and leverages resources effectively.	☐ Focus Area	
Customer Focus		
36. Strives to develop positive relationships with all customers.	☐ Focus Area	
37. Establishes processes and methods to respond to customer requirements.	☐ Focus Area	
38. Establishes processes to measure customer needs and levels of satisfaction.	☐ Focus Area	
Professional Measures Subtotal		0

Comments:

Part 2: Unit and Individual Goals

Expectations selected to be accomplished by a particular date. They are based on goals and objectives identified by a principal or department manager. They have been identified as being necessary to enhance the functional operations of the individual's area of responsibility for the upcoming performance cycle. Objectives must be measurable and must be agreed to by the administrator's evaluator.

It is recommended that the evaluating supervisor and the employee choose two goals aligned with the Individual School Improvement Plan or Department Deployment Plan. The third goal should be an individual goal aligned with the Strategic Plan.

 Assessment ratings for unit and individual goals are based on the following scale:

Indicators	Rating
Fully Achieved: The goal was fully realized in every meaningful way and by all objective measures. This rating is used to identify highly-effective use of goal-setting and goal attainment processes.	**3**
Substantially Achieved: The goal was largely realized. The objective measures may have technically fallen short of what was intended, but there is ample evidence of substantial improvement. This rating is used to identify effective use of goal-setting and goal attainment processes.	**2**
Partially Achieved: There is evidence of improvement, but objective measures are short of what was intended. Goal-setting and goal attainment processes were used, but with limited success.	**1**
Not Achieved: There is no evidence of improvement, and objective measures are unchanged or worsened. This rating is used to identify ineffective or incomplete goal-setting and goal attainment processes.	**0**

GOAL	MEASURABLE OBJECTIVE	MEASURED RESULTS	APPRAISAL RATING
1			
2			
3			
Unit and Individual Goals Subtotal			0

Comments:

School District of Lee County

	Administrative Performance Assessment Summary (Assistant Principals)				
	Administrative Practice Rating Summary				
	Below Expectations (Level 0)	Partially Meets Expectations (Level 1)	Meets Expectations (Level 2)	Frequently Exceeds Expectations (Level 3)	Consistently Exceeds Expectations (Level 4)
Part 1: Professional Measures	*Count*	*Count*	*Count*	*Count*	*Count*
	Not Achieved (Level 0)	Partially Achieved (Level 1)	Substantially Achieved (Level 2)	Achieved (Level 3)	
Part 2: Unit and Individual Goals	*Count*	*Count*	*Count*	*Count*	

Final Performance Rating Determinants			
Rating	**Administrative Practice Score (X)**	**Student Growth Score (Y)**	**Final Performance Score Range (X+Y)**
Highly effective (3)	Only Level 3 and Level 4 Ratings in Part 1 *AND* No ratings at Level 0 in Part 2	2.5 – 3.0	5-6
Effective (2)	No rating below Level 2 in Part 1 *AND* No more than 1 rating at Level 0 in Part 2	1.5 – 2.49	3-4
Needs Improvement (1)	1 rating below Level 2 in Part 1 *OR* 2 ratings at Level 0 in Part 2	0.51 – 1.49	2
Unsatisfactory (0)	2 or more ratings below Level 2 in Part 1 *OR* 3 ratings at Level 0 in Part 2	0 – 0.50	Unsatisfactory in Student Growth **OR** Administrative Practice

_____   _____
ASSESSOR'S SIGNATURE   **DATE**

_____   _____
ASSESSEE'S SIGNATURE   **DATE**

My signature does not necessarily imply agreement with the assessment, but acknowledges that I have discussed it with the assessor.

APPENDIX H: NON-CLASSROOM INSTRUCTIONAL PERSONNEL EVALUATION RUBRIC AND OBSERVATION FORM

The evaluation rubric used to evaluate non-classroom instructional personnel.

Full rubric available at http://learn.leeschools.net/dept/hr/teacher_eval_resources.htm