INSTRUCTIONAL PERSONNEL ASSESSMENT SYSTEM

IPAS



EVALUATION PROCEDURES

for

Instructional Personnel

(Classroom Teachers, Teachers on Special Assignment, Psychologists, Social Workers, ESE Specialists, Family and Guidance Counselors, Speech, Occupational, and Physical Therapists)



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PURPOSE OF THE IPAS

Performance planning and appraisal is a systematic approach and process which is designed to achieve the following:

- Document competencies and skills necessary for success in the positions of Classroom Teachers, Teachers on Special Assignment, Psychologists, Social Workers, ESE Specialists, Family and Guidance Counselors, and Speech, Occupational, and Physical Therapists.
- Delineate responsibilities to assist individuals in improving deficiencies as well as contribute to their professional growth and development.
- Improve individual and collective teaching performance resulting in optimal student learning.
- Facilitate prompt exchange of performance data between teacher and administrator.

Guiding Principles

The labor-management committee which designed the IPAS developed the following principles to guide the initial implementation and ongoing operation of the system.

- Administrators and teachers should be familiar with specific models of effective instructional strategies.
- Teachers and administrators using this system should be trained.
- The system should promote professional and organizational growth.
- The process should be appropriate for all specialties and assignments.
- The system should be reasonably easy to administer.
- The assessment process must meet legal requirements.
- The system should be based on the principle that performance can improve to higher levels of competency.
- A multi-dimensional approach will be taken for assessment i.e., not every teacher is intensively assessed annually.
- Administrators, peers, curriculum specialists, and others should be included as a regular integrated part of the assessment process.
- The process should take a supportive, positive approach toward improving performance which acknowledges competence.
- The district must make a financial commitment to make the evaluation system work.

OUTCOMES OF THE IPAS

- Stimulate improved job performance by clarifying performance expectations.
- Develop teacher effectiveness through emphasis on feedback, coaching, and professional development activities.
- Guide performance consistent with the District's Strategic Plan, the Florida Educator Accomplished Practices, and the Sterling Quality Criteria.
- Hold individual teachers accountable for student achievement.

The following persons, groups, departments, and offices are responsible for implementing components of the IPAS:

- Principals The principal implements IPAS activities at the school level. He or she is responsible for ensuring that each instructional employee is oriented and that the required assessment is completed. He or she may delegate some data collection activities to another administrator in the school.
- Annual Contract Teachers Teachers employed on annual contracts participate in the orientation program, review procedures, review criteria, and request assistance related to their performance, as needed.
- Teachers on a Professional Services (PSC) or Continuing (CC) Contract Teachers employed on a Professional Services Contract or a Continuing Contract participate in the orientation program, review procedures, review criteria, and request assistance related to their performance, as needed. In addition, they may participate in professional educator development activities organized for the IPAS.
- Division of Human Resources The Division of Human Resources develops an annual schedule of
 assessment activities. In addition, it receives completed forms, ensures the implementation of the system,
 and maintains assessment records in personnel files. The Division of Human Resources coordinates the
 Instructional Personnel Assessment Committee with the Broward Teachers Union. The Division
 periodically collaborates with the Department of Program Evaluation to evaluate the IPAS.
- Office for Professional Standards The Office of Professional Standards makes direct interventions with principals and teachers when performance is determined to be unsatisfactory.
- Human Resource Development Department This department coordinates training programs for assessors and teachers. In addition, it coordinates the New Educator Support System (NESS).
- Broward Teachers Union The Union supports the implementation of the IPAS through representation on the Instructional Personnel Assessment Committee.
- Instructional Personnel Assessment Committee This committee is responsible for monitoring and modifying the IPAS as needed. The committee monitors the implementation of the IPAS.
- Superintendent The Superintendent will notify the Department of Education of any instructional personnel who receives two (2) consecutive unsatisfactory annual evaluations and who have been given written notice by the District that their employment is being terminated or is not being renewed or that the School Board intends to terminate, or not renew their employment.

PARTICIPANT STATUS

Teachers are classified according to three categories depending on their length of uninterrupted teaching service in their current position and their certification status:

CERTIFICATION STATUS:

ANNUAL CONTRACT

This category includes all teachers who have not obtained their professional certificate.

PROFESSIONAL SERVICES CONTRACT

This category includes all teachers who obtained their professional certificate after 1984.

CONTINUING CONTRACT

This category includes all teachers who obtained their professional certificate before 1984.

IPAS STATUS:

DEVELOPMENTAL

This cycle of evaluation identifies teachers who are between certificate renewal years and are identified as having Satisfactory performance.

DOCUMENTATION

This cycle of evaluation identifies teachers who are either in their certificate renewal year, are Annual Contract (AC) status, or who have been identified as less than Satisfactory.

PERFORMANCE CRITERIA

IPAS recognizes performance through a variety of means. The categories are defined on the appraisal form (IPAS form). Each category contains several indicators that assist the appraiser in rating the appraisee with respect to the category. Performance criteria provides for parent input (Within thirty (30) days after the start of each school year, parents will be notified in writing by each school administration of their right to provide input into employee performance assessments when appropriate in accordance with F.S. 1012.34.).

Instructional Planning

- Develops lesson plans and selects instructional materials and activities which reflect the district's curriculum scope and sequence and identify learners' needs.
- Develops lesson plans which reflect the prerequisite knowledge, skills, and readiness of students.
- Relates instructional elements such as content, materials, activities, format, and goals to identified student needs.
- Identifies and sequences content.
- Specifies learner objectives and relates these to the instructional activity.
- Specifies the steps, sequence, and pacing of student activities appropriate to their needs and the content area.

Lesson Management

- Orients students to classwork, specifies purposes of activities and relationship to the objectives.
- Prepares the classroom, materials, and equipment for the presentation of the lesson.
- Transitions from one activity or topic to another in accordance with lesson plans and learners' needs.

Lesson Presentation

- Selects and uses appropriate instructional techniques including available materials and technology which support learning of the specific types of knowledge or skills.
- Emphasizes what is important to remember.
- Asks questions which are clear and require students to reflect before responding.
- Circulates about the room as students engage in seatwork and assists students as needed.
- Uses different types of questions to obtain desired learner responses.
- Gives clear, brief, and explicit directions and checks for understanding.
- Recognizes students' responses to questions and provides feedback.
- Reviews student work and provides timely and specific written or verbal feedback.

Student Performance Evaluation

- Selects or develops a variety of assessments and formats related to specific learning objectives.
- Uses test data to diagnose individual student strengths and weaknesses.
- Grades tests accurately and objectively.
- Creates a positive test-taking atmosphere.
- Monitors students during testing.
- Instructs students in test-taking techniques.
- Monitors student progress in attaining achievement standards and objectives established by the school, innovation zone, area and District.
- Provides evidence of improvement in student performance through norm-referenced and criterion-referenced standardized test results or required state assessments where available and at least one of the other following assessment strategies selected by the teacher: student performance demonstrations, teacher observations and portfolios of student work. Where the above referenced standardized student tests are not available, the principal will also select one of the other assessment strategies listed above. The parties recognize that standardized test scores can be influenced by a number of factors outside the school setting such as student mobility rates, the number of special need students, parental support, etc.

Communication

- Speaks in a clear, audible, well modulated voice.
- Uses correct grammar in written and oral communications.
- Presents connected or associated ideas and thoughts.
- Expresses interest and excitement through verbal and nonverbal behavior.
- Demonstrates basic mechanics of writing: spelling, capitalization, and punctuation.
- Communicates learner status and progress to parents in order to maintain a positive, collaborative relationship. Additionally, communicate learner status and progress to the student and other professionals.

Classroom Management

- Creates and maintains an organized and pleasant working environment in the classroom.
- Encourages students to participate and contribute to class activities.
- Promotes positive student self-concepts.
- Identifies individual social, emotional and/or physical needs that might affect school success.
- Establishes an environment conducive to positive peer interaction.
- Uses appropriate procedures to refer individual students for further assessment or intervention by other professionals.

Behavior Management

- Establishes and implements specific behavioral and procedural expectations, rules, and consequences.
- Demonstrates an awareness of what all students are doing.
- Reinforces positive student behavior.
- Stops inappropriate behavior before it spreads or becomes more serious.

Records Management

- Maintains an organized, accurate, and up-to-date lesson plan and grade book.
- Maintains accurate attendance records.
- Maintains a system for recording individual student's knowledge and skills progress in a subject area.

Subject Matter Knowledge

- Presents accurate information.
- Recognizes and promotes the relationship of the subject with the school's curriculum.
- Appropriately organizes and presents content for the specific subject.

Other Professional Competencies

• Complies with Florida Statutes, State Board of Education Rules, School Board of Broward County Policies, and other applicable regulations

PERFORMANCE RATINGS FOR IPAS CATEGORIES

Each appraisee's performance is rated at the end of the school year. Ratings on the IPAS appraisal form will be determined by the following scale:

- S = Satisfactory Meets Job Standard Performance exhibits/demonstrates the description linked to each of the categories.
- For an **overall** rating of Satisfactory (S), all of the categories on the IPAS must be assessed as (S) Satisfactory.
 - $N = Needs \ Improvement Does \ Not \ Meet \ Job \ Standard Performance does not exhibit/demonstrate the description linked to each of the categories.$
- For an **overall** rating of Needs Improvement (N), one or more of the categories must be assessed as Needs Improvement (*providing there are no ratings of Unsatisfactory (U)*).
- Only teachers on Annual Contract (AC) may receive a Needs Improvement (N) rating on their IPAS.
- For the purposes of re-employment of first or second year annual contract employees or for recommendation of an employee for Professional Services Contract only, a Needs Improvement rating will have the same effect as a Satisfactory rating.
- This rating may only be used when a Performance Development Plan (PDP) is implemented.
 - U = Unsatisfactory Does not meet Job Standard Performance does not exhibit/demonstrate the description linked to each of the categories.
- For an **overall** rating of Unsatisfactory (U), one or more of the categories must be assessed as Unsatisfactory (U).
- This rating may only be used when a Performance Development Plan (PDP) is implemented.

IPAS PROCEDURAL STEPS

The IPAS process consists of five major stages: Training, Orientation, Observations/Data Collection, Feedback Conferences, and Staff Development.

STEP I

Required Training

- Florida Performance Measurement System (FPMS) Initial training is required for all Principals, Assistant Principals, Administrative Interns and all administrators who evaluate teachers or teachers on task.
- Florida Performance Measurement System (FPMS) Update training is required for all Principals, Assistant Principals, Administrative Interns and all administrators who evaluate teachers or teachers on task as offered.
- Florida Performance Measurement System (FPMS) Overview is required for all Principals, Assistant Principals, Administrative Interns and all administrators who evaluate teachers or teachers on task as offered.
- New Educator Support System (NESS) training is required for all Principals, Assistant Principals, Administrative Interns and all administrators who evaluate teachers or teachers on task.
- Interaction Management training is required for all Principals, Assistant Principals, Administrative Interns and any administrators who evaluate teachers or teachers on task.
- Instructional Personnel Assessment System (IPAS) training is required for all Principals, Assistant Principals, Administrative Interns and any administrators who evaluate teachers or teachers on task, and for teachers in their renewal cycle.
- Instructional Personnel Assessment System (IPAS) Orientation is required for all Principals, Assistant Principals, Administrative Interns and any administrators who evaluate teachers or teachers on task as offered.

STEP II

Orientation

- The Principal or designee conducts an orientation program at the beginning of each school year. Instructional personnel are advised of the following points:
 - Assessment criteria
 - Assessment forms
 - Assessment procedures and timelines
- Each new employee is given a copy of the assessment form and the assessment criteria before September 15th or upon employment subsequent to September 15th.

STEP III

Observations/Data Collection

- The following five (5) techniques are used to gather data on employee performance. Assessors use multiple techniques to understand actual performance and develop performance ratings.
 - Observations in non-classroom situations: Principals use opportunities outside the classroom to observe the performance of employees. A follow-up conference is not required subsequent to this type of observation if performance is deemed satisfactory.
 - Review of records and plans: Principals review a variety of work samples prepared by the employee. These may include lesson plans, reports, grade card comments, discipline referral documents, etc. In addition, specific records or plans may be requested for review. A follow-up conference is not required subsequent to a review of records or plans if performance is deemed satisfactory.
 - Review of performance portfolio: The principal or designee and the employee may mutually decide that a performance portfolio is needed to provide additional information for the completion of the assessment ratings. The design of a portfolio is determined by the principal and employee. A follow-up conference is not required subsequent to the submission of a performance portfolio if performance is deemed satisfactory.
 - *Informal classroom observations*: Informal observations are made periodically by the principal or designee. A follow-up conference is not required subsequent to an informal classroom observation if performance is deemed satisfactory.
 - Formal classroom observations: Formal observations are primarily initiated by the principal or designee. Employees may, however, request a formal observation. Formal observations are not less than 30 minutes in duration and are conducted by the principal, director or his/her designee. The 30 minute time period may be shortened by mutual agreement between the principal and the affected employee.
- All observations of employees for the purpose of assessment will be conducted openly with the full knowledge of the employee.
- The Florida Performance Measurement System (FPMS) or other educationally sound observation instruments may be used for formal observations.
- Prior to each formal assessment of personnel on an *annual contract*, no fewer than one (1) observation in the classroom or equivalent work location, of no less than 30 minutes will be conducted by the principal, director or his/her designee during the first semester of the contract period. The 30 minute time period may be shortened by mutual agreement between the principal and the affected employee. All formal observations of employees for the purpose of assessment will be conducted openly with the full knowledge of the affected employee. Any classroom observations or other factors which are used for assessment purposes will be included on the formal assessment and discussed with the employee. No formal observations will be conducted during the last week of the school year.
- Principals and designee may use the FPMS structured observation instrument in formal observations.
- Notification Initial Observation of First Year Annual Contract Teachers
 For the first required observation of the first year annual contract employees the assessor will notify the
 employee in advance of the week in which the observation is to take place. However, employees with a
 continuing contract may receive no advance notification of observation.
- Employee Requested Follow-up Observation The employee may request a follow-up formal observation. Such observation will be conducted not less than ten (10) working days from the date of the request and will be at least thirty (30) minutes in length, unless the affected employee and principal mutually agree to a shorter time period. Such observations will be discussed and incorporated into the assessment process in accordance with this section, if requested prior to the final assessment conference.

STEP IV

Feedback Conferences

- Conferences are used to communicate the results of data collection activities and the completion of the assessment form. Assessors are encouraged to give feedback to employees on a regular and frequent basis through formal and informal conferences. Feedback includes recommendations for individual professional development and performance improvement.
- **Post Observation Conference**: Not later than ten (10) working days after each observation and prior to completion of the assessment form, the assessor will meet with the employee to discuss the intended written, formal assessment.
- **Employee Requested Follow-up Conference**: Upon request of the employee, the assessor will schedule a follow-up conference at which the employee may be represented. Any change in the assessment as a result of this conference will be initialed or signed by the assessor and employee and the final assessment will be treated in a manner consistent with this section.
- Annual Assessment Conference: A conference is conducted with each employee to review the annual assessment form. After such discussion and upon completion of the formal assessment, the assessor and the employee will sign the assessment form, with a copy to the employee before it is placed in the employee's personnel file. Such signature by the employee only acknowledges that the report has been read and does not necessarily indicate agreement with its contents. No employee will be required to sign a blank or incomplete assessment form. The employee will be provided a copy of the signed assessment form within ten (10) working days following the discussion. No assessments and final assessment conferences will be conducted during the last week of the school year.

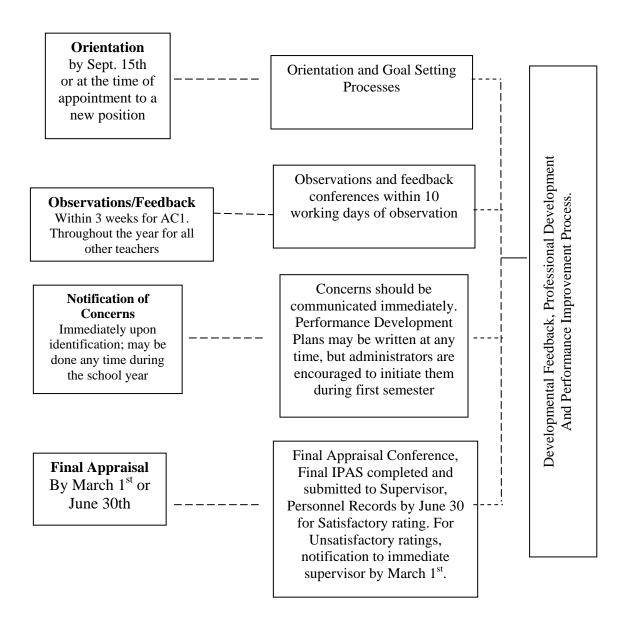
STEP V

Staff Development

- Teachers, coaches, and administrators are encouraged to attend staff development throughout the cycle to update and hone skills. Staying abreast of innovative teaching techniques, data collection and interpretation, and conferencing skills, among others, is imperative to improving teacher performance.
- Employees may elect to participate in the activities described below:
 - Learning Communities
 - External staff development
 - Internal staff development
 - College courses
 - Online courses
 - Individual and team projects

THE IPAS TIMELINE

The *Instructional Personnel Appraisal System* (IPAS) focuses on continuing achievement and striving for excellence. The IPAS is designed to improve the performance of the organization and its employees. Professional development and developmental feedback stages are on-going throughout the year. Performance Improvement needs may be identified at any time during the year.



PERFORMANCE DEVELOPMENT PLAN PROCESS

STEP 1 DEFICIENCIES ARE NOTED: Pre-conference(s) outlining areas of deficiencies should be conducted and assistance offered prior to placement on a Performance Development Plan (PDP).

STEP 2 DEFICIENCIES CONTINUE: An IPAS appraisal is conducted and a Performance Development Plan (PDP) is developed *if one or more* categories are identified as Needs Improvement or Unsatisfactory. The appraisee will be notified of performance deficiencies in writing. This action may take place at any time.

STEP 3 DEVELOPMENT OF THE PDP:

- Categories rated as Needs Improvement or Unsatisfactory must be identified in writing on the PDP.
- Expected outcomes must be outlined on the PDP.
- Appropriate activities/tasks for improvement (and a timeline for their completion) that may include staff development activities will be developed collaboratively between appraiser and appraisee.
- The PDP must identify a date in which the PDP and progress made will be reviewed.
- The PDP must identify a date for the conclusion of the PDP.
- Consequences for failure to correct the identified deficiencies must be indicated in writing on the PDP.
- If the employee chooses not to sign the document, a witness will verify such.

STEP 4 FEEDBACK

• An appraise with a PDP will be afforded developmental feedback regularly as determined by the appraiser and apprised of progress achieved and noted on the PDP.

STEP 5 PDP CLOSE OUT

- At the conclusion of the period of time listed on the PDP for correcting the performance deficiencies, the appraiser will notify the appraisee in writing as to whether or not the performance deficiencies have been corrected.
- If deficiencies are corrected, the formal evaluation shall reflect the appropriate rating.
- If said deficiencies are not corrected, an appraisee's final year-end evaluation is to be rated an overall Needs Improvement (N) or Unsatisfactory (U).
- The appraisee may file district's grievance procedures in writing and/or attach a statement to the appraisal within 10 days of its completion.
- When the overall performance of an employee is determined to be Unsatisfactory on the final assessment, the Department of Human Resources is notified.

INSTRUCTIONS FOR COMPLETING FORM

- The three IPAS evaluation forms are to be used for all instructional, media, and student services personnel.
- Assessment of Beginning Teachers
 Assessment of employees enrolled in the New Educator Support System (NESS) conforms to the procedures
 for the evaluation of annual contract teachers contained in the contract. Observations, documentation, and
 conferences completed for these employees supports the completion of the assessment form required for the
 IPAS.
- Assessment of Psychologists and Other Employees
 Psychologists and other employees whose assignments essentially involve extensive individual casework will be assessed by observation and review of assigned casework at least once annually. Such assessment(s) will be conducted by the Director or Area Coordinators of Psychological Services for psychologists and the similar respective program director for other employees.
- Instructional covers classroom teachers, teachers on special assignment (TSA), coaches, behavior
 specialists, ESE specialists, family and guidance counselors, speech, occupational, and physical therapists,
 etc. Media covers the media specialist of the school (not the media clerk). Student Services covers
 psychologists and social workers, but may be used for other student services employees if administration
 deems it appropriate.
- At least one assessment of each employee will be conducted by the principal, director, or his/her designee.
- The 'Type of Assessment' (located at the top of the form) should be should be checked as either:
 - Development All teachers excepting those listed below in Documentation.
 - Documentation All Annual Contract (AC) teachers, all teachers in their fifth year of certificate renewal, and all teachers placed into documentation for performance deficiencies.
- The 'Contract Status (located at the top of the form) should be completed as AC (Annual Contract), PSC (Professional Services Contract), or CC (Continuing Contract).
- The 'Collection Dates' (located at the top of the form) should be completed as a range, i.e. 9/15/03-5/15/04.
- Three groups of teachers must be observed prior to receiving an evaluation:
 - 1. Annual Contract teachers;
 - 2. Teachers in their fifth year of certificate renewal; and
 - 3. Teachers placed into documentation for performance deficiencies.

INSTRUCTIONS FOR COMPLETING FORM

(continued)

- The rules for using the ratings are as follows:
 - An *overall* rating on the final evaluation of Needs Improvement (N) or Unsatisfactory (U) may only be given when a PDP has been developed.
 - A Needs Improvement may only be used for Annual Contract teachers.
- One or more indicators rated as Needs Improvement results in an *overall* Needs Improvement.
- One or more indicators rated as Unsatisfactory results in an overall Unsatisfactory.
- The Coordinators, Evaluation must be notified prior to the writing of a PDP.
- The form is completed by the assessor and signed by the employee. The employee's signature indicates only that he/she has read the form and does not necessarily indicate agreement with its content.
- The final assessment form and any attachments thereto become the complete documentary record of the employee's performance during the particular performance period.
- The Substitute Teacher Evaluation is optional and is used at the discretion of the Principal. When completed, it is submitted to Supervisor, Personnel Records. An Unsatisfactory performance will result in being placed on the location's "Do Not Use" list and will count as a negative evaluation for the substitute. The Substitute Teacher Clearance Form states: My name may be removed from the approved substitute teacher list when three or more schools have negatively evaluated my performance.

PERFORMANCE IMPROVEMENT PLAN PROCESS FLOW CHART

