



Evaluation Timeline/Checklist for Direct Supervisors

Resource: [SPS Evaluation Platform: Guidebook for Evaluators](#)

Annual/Ongoing	<ul style="list-style-type: none"> ● HR/Payroll process New Hire/Change Forms & Employee Modification Forms in MUNIS (which is sync'd to PowerSchool- Records & Perform). <ul style="list-style-type: none"> ○ 9 month employees forms are processed July-September. Therefore, there may be a delay in being active in Perform and evaluation process assigned.
September	<ul style="list-style-type: none"> ● HR assigns evaluation processes to employees in Perform based on Job Classes. Then, through an automation process, new hires or individuals who change job classes that are tied to a different evaluation will be assigned to their evaluation process. <u>Evaluations in Perform</u>. This is ongoing as staff updates are completed in MUNIS.
September-ongoing	<ul style="list-style-type: none"> ● Perform Users (Direct Supervisors)- In Perform, under My Staff, Staff: review your “evaluation” tab to ensure all employees have been assigned the correct evaluation process. Review “Not Evaluated” tab to identify if anyone needs to be assigned an evaluation process. Contact HR for support for any corrections.
September	<ul style="list-style-type: none"> ● Review District, Department/Building Goals with staff <ul style="list-style-type: none"> ○ Provide the following resources to staff members: <ul style="list-style-type: none"> ■ For Direct Reports (Employees being evaluated- share the below documents with those being evaluated using Perform platform. Please have them review prior to completing any forms in Perform): <ul style="list-style-type: none"> ● Intro to Perform Video from Dr. Liz Cooper, Director of Human Resources ● SPS Evaluation Guidebook (Perform) for Educators- fluid document ● Getting Started with Perform- Evaluation Process- Teacher (Educator) ● Perform- Direct Report Quick Start Guide (“Direct Report” is individual being evaluated) ● Teacher Quick Start Guide ● Teacher Training Video: https://performancematters.wistia.com/medias/hcobo3xvd0 ● Perform Teacher Evaluation Training (BOY)- example provided by a principal (feel free to copy and update for your school and appropriate goals). ● Indicator Selection for Growth Plans (2021-2022) ● Growth Plans- due Oct. 3, 2022 <ul style="list-style-type: none"> ○ Direct Reports (Employees) should complete their Growth Plan- BOY in Perform (as applicable). Perform- Educators Process (Teacher/Administrator)- for evaluators’ review ○ Review Growth Guides for BOY Self Evaluation <ul style="list-style-type: none"> ■ Resources ○ For certified building employees (for Growth Plans):

	<ul style="list-style-type: none"> ■ Growth Plan- Beginning of the Year Tutorial- Step 1 (step by step tutorial for direct report to enter in Perform)- tutorial for Direct Report (ex: Educator) ■ Growth Plan- Beginning of the Year Tutorial- Step 2 (step by step directions for Supervisors, once Direct Report submits as indicated above)- tutorial for Direct Supervisor/Principal ■ Growth Plan- Beginning of the Year Tutorial- Direct Report Signature to “Finalize”- Step 3 (step by step directions for Direct Report, signs off on Growth Plan once Supervisor “Approves” BOY Growth Plan and it routes back to them)
<p>September-May</p>	<ul style="list-style-type: none"> ● Ongoing, effective feedback <ul style="list-style-type: none"> ○ Utilize feedback forms in assigned process ○ Upload artifacts, as appropriate, in Perform ● For educators, <ul style="list-style-type: none"> ○ Indicator Feedback Forms: Use the feedback forms that are provided for the assigned evaluation process to provide feedback throughout the year. For certified employees, please refer to the data points (number of feedback forms) based on tenure status (PBTE Codes (MUNIS)) and if “on-cycle” for a summative. Educator Indicator Feedback Form <ul style="list-style-type: none"> ● Feedback specifically related to Growth Plan goals (and other indicators as observed) and longer observations.. ○ Monthly Walkthroughs (Educator Observation Tool)- Monthly Walkthroughs (Aug/Sept, Oct., Nov., Dec/Jan., Feb., March)- minimum of 6 using the form in the evaluation process for all certified positions (do not use the “walkthrough” button as any walkthrough forms using this button are “ad hoc” and will not count towards the reporting numbers. Walkthroughs are mini-observations and last typically 5-10 minutes. Educator Observation Tool (Walkthrough)
<p>October</p>	<ul style="list-style-type: none"> ● By Oct. 3, 2022: Growth Plan (BOY) need to be finalized (completed).
<p>March 1</p>	<ul style="list-style-type: none"> ● Growth Plan- End of Year <ul style="list-style-type: none"> ○ Certified employees who have a PBTE Code of a P or W’s (probationary teachers) as well as those being recommended for non-renewal are due March 1. ● Summative <ul style="list-style-type: none"> ○ Certified employees who have a PBTE Code of a P or W’s (probationary teachers) as well as those being recommended for non-renewal are due March 1. <p>Resources/Support for EOY Growth Plans & Summatives:</p> <ul style="list-style-type: none"> ■ Growth Plan- End of the Year Tutorial (step by step directions on how to enter in Perform for Direct Reports)- Step 1

	<ul style="list-style-type: none"> ■ Growth Plan- End of the Year Tutorial (step by step directions on how to finalize- for Direct Supervisors.- Step 2) ■ Growth Plan- End of the Year Tutorial, Direct Report Signature (to finalize)- Step 3 ■ Summative- tutorial for direct supervisors (Step 1 and shows entire process to finalize) <ul style="list-style-type: none"> ● Summative- Direct Report Signature (can share with educators/employees on how to “sign off” after submitted/finalized- sent to them for their signature).
May 15	<ul style="list-style-type: none"> ● <i>Growth Plan- End of Year</i> <ul style="list-style-type: none"> ○ Classified employees and certified (tenured- on or off cycle) are due May 15th. ● <i>Summative</i> <ul style="list-style-type: none"> ○ Classified employees (all) and certified (tenured- on cycle) are due May 15th.

Friendly Reminders Regarding Summatives:

- ”Teachers” (positions that DESE requires a teaching certificate- ex: counselors, teachers, librarians), receive a summative while they are probationary (first 5 years), new to the position/location (transferred schools) or on a professional improvement plan. Once reached tenure status- once every 5 years unless they transferred (get a summative that year) or on a PIP. Refer to PBTE codes. Instructional Techs. can now gain tenured status and should follow this evaluation process as well.
- **Evaluations not in Perform** (but were in Randa Tower)- can complete these and upload as an artifact in Perform (download and save to your desktop)
 - [Administrative Assistant](#) (Secretary)
 - [Motor Staff](#)
 - [Paraprofessional or Behavior Technician](#)
 - [School Nurse](#)
 - [School Police](#)
 - [Non-Exempt Evaluation Form](#)
 - [Exempt Employee Performance Appraisal Form](#)
- Classified positions (positions that DESE does not require a teaching certificate), which also include the following positions, receive an annual evaluation and should have a minimum of 4 data points:
 - Speech Language Pathologists (SLPs) are being evaluated annually now, as well as, other therapists (OTs and PTs).
 - Process Coordinators
 - School Psychologists
 - Educational Diagnostician

- SLPs
- OTs
- PTs
- ECSE Assessment Team