



Superintendent's Circular

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Version 01

PERFORMANCE EVALUATION OF MEMBERS OF THE ADMINISTRATIVE GUILD

The following sets forth the philosophy, roles, responsibilities, and procedures applicable to the evaluation process for members of the Administrative Guild.

I. COVERAGE

The contract between the School Committee and the Administrative Guild provides for both annual and interim evaluations of the performance of all employees represented by the Guild. The evaluation process relates to the duties and responsibilities of the employee's position, as set forth in the employee's job description.

The job descriptions are general in nature and are not intended to change any employee's existing responsibilities. The format of the job descriptions allows supervisors to determine the specific job duties associated with the position's classification.

The supervisor should obtain a copy of the appropriate job description and provide it to each employee under their jurisdiction. The supervisor should also communicate clearly to the employee the specific duties associated with the position as well as any additional information pertaining to the position. Members of the Administrative Guild can also contact their OHC Staffing Manager to access job descriptions.

II. PHILOSOPHY

The Boston Public Schools recognizes that the quality of educational service depends upon the professional performance and total job effectiveness of all employees. Since clerical and technical employees can and should be held accountable for the quality of their performance, a just and effective process for evaluating that performance is essential. True performance evaluation involves an analysis of an employee's strengths and weaknesses, resulting in diagnoses and prescriptions that lead to the desired improvement of skills and performance.

All clerical and technical employees will be evaluated using the diagnostic-prescriptive approach, and the procedures and forms developed for the implementation of this approach.

A diagnostic-prescriptive evaluation program is positively directed and encourages employees to maximize their unique strengths and skills. It encourages employees to participate in the evaluation of their own performance and to help set objectives for self-improvement. The performance evaluation process, however, is not intended to be a substitute for the day-to-day communication with and supervision of employees.

An effective performance evaluation program is one that is continuous rather than periodic and organized to:

- develop a clear understanding of the goals of the department or school;
- assist employees in addressing more effectively the needs of each school or department; and
- encourage cooperative staff relations through mutual trust and respect for each employee's role.

III. ROLES AND RESPONSIBILITIES

Heads of school, principals, and other administrative heads have chief responsibility for the evaluation of all staff in their responsibility centers. Performance evaluations must be conducted by the employee's most immediate supervisor who is not a member of the Guild bargaining unit.

A supervisor's failure to address the job performance problems of their staff through the performance evaluation process represents unacceptable performance for which the supervisor will be held accountable.

Further, a supervisor will also be performing unsatisfactorily if an underperforming staff member is given a satisfactory rating and then encouraged to transfer to another school or department. A supervisor who does this will be held accountable as part of their performance evaluation.

IV. DIAGNOSIS AND RECOMMENDATIONS

The performance evaluation process should provide each employee with an appraisal of their strengths and identify areas in need of improvement. The employee will be evaluated on each standard within the various categories. There are four possible ratings:

E – EXEMPLARY:	The employee's performance of the duties and responsibilities of their position exceeds expectations.
P – PROFICIENT:	The employee's performance of the duties and responsibilities of their position meets expectations.

N – NEEDS IMPROVEMENT:	The employee's performance of the duties and responsibilities of their position needs improvement.
U – UNSATISFACTORY:	The employee has failed to meet expectations and their performance of the duties and responsibilities of their position needs improvement.

Every interim and annual evaluation must result in a mark for each appropriate item on the evaluation form. *In any area where the supervisor indicates a need for improvement, they will provide the employee with a written prescription within the evaluation document.* The diagnosis and subsequent prescription should be fully descriptive and instructive, suggesting specific remedies or recommendations for adoption by the employee. The employee may suggest additional or alternative prescriptions.

V. PERFORMANCE MANAGEMENT PROCESS

The performance of employees represented by the Guild bargaining unit is evaluated annually. The evaluation year is from July 1 to June 30 for each employee.

Performance evaluation activities may include, but are not limited to, preliminary planning conferences, daily observations, notations, formal interim evaluations, follow-up conferences, and recommendations to the employee by the evaluator.

During the entire evaluation process, continuous administrative assistance, support, and encouragement should be extended to assist the employee in meeting established objectives.

STEP 1 – PRELIMINARY PROCEDURES

At the beginning of each evaluation year, the head of school, principal, or other administrative head should meet with their supervisory staff to orient them to the performance evaluation process and to their roles and responsibilities within that process for the upcoming year. Guild members will be evaluated by their most direct supervisor or designee who is not a member of the Guild bargaining unit.

For all new employees or after a change in supervision, the evaluator must meet with the employee no later than 30 days after the start of the evaluation year to discuss and explain the evaluation process, the evaluation instrument, and to clarify the responsibilities and objectives of the position.

The evaluator and the Guild member will sign the evaluation instrument indicating the date of such meeting.

STEP 2 – PREPARE DIAGNOSIS AND RECOMMENDATIONS (AS NEEDED)

If at any time, including at the interim evaluation meeting (see step 3), a supervisor finds that an employee needs major improvement in their job performance or in accomplishing any goal, the supervisor will prepare a written diagnosis of the situation, recommendations for improvement, and will share this feedback with the employee within a reasonable amount of time.

STEP 3 – INTERIM EVALUATION PROCEDURES

All new employees or employees under new supervision should receive an interim evaluation no later than November 15, if reasonably possible. All other employees will be evaluated a minimum of one time during the school year. However, to receive a rating of “Unsatisfactory” in any category on an annual

evaluation, an interim evaluation must have been previously conducted.

If an interim evaluation includes a rating(s) of Unsatisfactory and/or Needs Improvement in any category, then the supervisor will communicate in writing the reasons for the rating(s) of Unsatisfactory and/or Needs Improvement within the evaluation form and provide prescriptions for improvement. A follow-up evaluation or evaluations for an interim overall unsatisfactory evaluation must be done after a minimum of 20 school days and no later than 50 school days from the last evaluation during which a member is present. All initial "Unsatisfactory" interim evaluations should have a follow-up evaluation no less than 20 school days during which the employee is present.

The same form is used for interim and annual evaluations.

STEP 4 – POST INTERIM MEETING EVALUATION CONFERENCE

Within ten (10) working days in which the employee is present following the completion of an interim evaluation document, the evaluator will meet with the employee to discuss the evaluation.

During this conference, the evaluation and a copy of it will be provided to the employee, who will sign both the original and the copy to indicate that they have seen and acknowledged it, but not to indicate agreement or disagreement with its contents. The supervisor must retain the signed copy. The employee has a right to attach a written response to the evaluation.

If an employee receives a mark of Needs Improvement or Unsatisfactory on any item on their performance evaluation form, the principal, head of school, or other administrative head must immediately submit this evaluation form to the Office of Human Resources.

Interim evaluations will not be placed in the employee's permanent file.

STEP 5 – ANNUAL EVALUATION PROCEDURES

Annual evaluations must be completed **no later than June 1** of each year.

If an evaluation includes a rating(s) of Unsatisfactory and/or Needs Improvement in any category, then the supervisor will communicate in writing the reasons for the rating(s) of Unsatisfactory and/or Needs Improvement within the evaluation form and provide prescriptions for improvement. However, **to receive a rating of “Unsatisfactory” in any category on an annual evaluation, an interim evaluation must have been previously conducted.** If an employee received a Needs Improvement or Unsatisfactory rating on any item on the form, the Principal, Head of School, other Administrative Head must immediately submit this evaluation form to The Office of Human Resources.

STEP 6 – POST ANNUAL EVALUATION CONFERENCE

Within ten (10) working days in which the employee is present following the completion of any evaluation document, the evaluator will meet with the employee to discuss the evaluation.

During this conference, the evaluation and a copy of it will be provided to the employee, who will sign both the original and the copy to indicate that they have seen and acknowledged it, but not to indicate agreement or disagreement with its contents. The employee has the right to attach a written response to the evaluation form.

If an employee receives an annual overall Unsatisfactory evaluation, the supervisor may initiate termination by recommending to the Superintendent that such employee be

terminated.

STEP 7 – SUBMIT PERFORMANCE EVALUATION FORMS TO THE OFFICE OF HUMAN RESOURCES

At the end of each evaluation year, the principal, head of school, or other administrative head should retain the copies of *all* evaluations and send/deliver the originals of all evaluations to the Office of Human Resources front desk. If the performance evaluation is overall Unsatisfactory, a copy should also be sent to the director of evaluation and performance management, Office of Human Resources.

Note: An employee with an “Unsatisfactory” performance evaluation has no bidding rights until that employee receives a subsequent “satisfactory” performance evaluation. For the purposes of this section, an “Unsatisfactory” evaluation means an unsatisfactory rating in any two areas on an interim or annual evaluation.

VI. PROCEDURES FOR DISCIPLINE

If a principal, head of school, or other administrative head determines that an employee has committed an infraction of work rules such as excessive tardiness, absences, etc., the supervisor should follow the procedures outlined in the Superintendent's Circular on Employee Discipline Procedures.

Additionally, the supervisor should consider the infraction in evaluating the employee's overall performance.

VII. FORMS

The Performance Evaluation Form for Members of the Administrative Guild is attached.

Summary of significant dates and deadlines:

DATE	ACTIVITY
Within the first 30 days of Evaluation Year	For new employees/employees under new supervision only: Review job description and evaluation instrument. Sign cover page to acknowledge meeting.
No later than November 15	For new employees/employees under new supervision only: Complete first Interim Evaluation
June 15	Deadline to send signed, original copies of evaluations to: Bruce C. Bolling Municipal Building Office of Human Resources Attn: OHC Front Desk 2300 Washington Street, 4th floor Roxbury, Massachusetts 02119
July 1 to June 30	The evaluation year of an Administrative Guild employee

For more information about this circular, contact:

Owner:	Director of Evaluation and Performance Management
Department:	Office of Human Resources
Mailing Address:	2300 Washington Street, 4 th Floor, Boston, MA 02119
Email:	eval@bostonpublicschools.org ohc@bostonpublicschools.org

Mary Skipper, Superintendent

BOSTON PUBLIC SCHOOLS ADMINISTRATIVE GUILD
PERFORMANCE EVALUATION FORM

Name: _____ Employee ID: _____

Current Position and Grade: _____ Date: _____

Permanent Position and Grade: _____

Department/School: _____

Evaluator: _____

Check One: Interim Evaluation: ☐ Annual Evaluation: ☐

Evaluator's Signature: _____ Date: _____

Employee's Signature: _____ Date: _____

The employee's signature indicates that they have seen and discussed the evaluation. It does not denote agreement with it.

Evaluator's Supervisor

Signature: _____ Date: _____

Initial Pre-Evaluation Conference:

Evaluator's Signature: _____ Date: _____

Employee's Signature _____ Date: _____

Review the employee's job description and then complete the form. The following scale will be used for ranking performance:

E - EXEMPLARY	The employee's performance of the duties and responsibilities of their position exceeds expectations.
P - PROFICIENT	The employee's performance of the duties and responsibilities of their position meets expectations.
N - NEEDS IMPROVEMENT	The employee's performance of the duties and responsibilities of their position needs improvement.
U - UNSATISFACTORY	The employee has failed to meet expectations and their performance of the duties and responsibilities of their position needs improvement.

The evaluator will circle the letter that applies, or if the form is being completed electronically, the evaluator should underline or bold the letter that applies. Any rating of "U" or "N" must be accompanied by a supporting diagnosis and prescription. The evaluator may add comments to ratings of "P" and "E" at their discretion.

Performance Ratings (see Performance Standards descriptions below):

(Place an X in the appropriate box for each standard and overall)	E	P	N	U
Standard I: Job Functions				
Standard II: Collaboration and Initiative				
Standard III: Communication				
Standard IV: Professionalism and Growth				
Overall Rating				

Supervisor's Comments

1. How long has this employee been under your supervision?
2. General comments, significant other achievements, appraisal of potentialities.

3. This diagnosis and prescription section must be completed for each category evaluated as U – Unsatisfactory. Identify the item number, the observable need for improvement, the recommendation, and the target date for improvement.

Employee's Comments:

ADMINISTRATIVE GUILD PERFORMANCE STANDARDS

Standard I: Job Functions. The employee effectively supports the district's and department/school's mission through demonstrated job-specific skills, knowledge, and quality of work after proper instruction.

Indicators	Unsatisfactory	Needs Improvement	Proficient	Exemplary
I-A. Skills and knowledge	Demonstrates a critical lack of necessary skills and knowledge to perform one's own job, including the ability to effectively use relevant, position specific technology.	Demonstrates some, but not all, of the necessary skills and knowledge to perform the employee's own job, including the ability to effectively use relevant position specific technology.	Has the necessary technical skills and knowledge to perform the employee's own job, including the ability to effectively use relevant position specific technology.	Demonstrates proficiency AND serves as a resource for other employees in similar or related positions.

I-B. Quality of Work	Demonstrates effectiveness at few to none of the responsibilities defined in the employee's job description.	Demonstrates effectiveness at some, but not all, of the responsibilities defined in the employee's job description.	Accurately, competently, and in a timely manner performs assigned tasks as set forth in the job description.	Demonstrates proficiency AND makes significant or noteworthy contributions towards helping accomplish the school/department goals.
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Standard II: Collaboration and Initiative. The employee supports the district's and the department/school's mission and goals by cultivating a shared vision, modeling responsibility, accountability, and cooperation.

Indicators	Unsatisfactory	Needs Improvement	Proficient	Exemplary
II-A. Teamwork	Demonstrates a pattern of refusal to support supervisor and others as identified in the job description.	Demonstrates limited accuracy and support of supervisor and others as identified in the job description when asked.	Establishes and maintains relationships that promote the advancement of common goals by providing accurate and reliable support.	Demonstrates proficiency AND takes initiative to identify and act upon new opportunities to support school/department missions.
II-B. Motivation and Initiative	Requires direct intervention and continual oversight from supervisor to	Requires increased oversight or reminders for routine duties despite receiving	Accomplishes work after proper instruction; seeks clarification when needed performs	Demonstrates proficiency AND recommends solutions, as well as takes initiative on

	perform the duties outlined in job description.	standard support.	tasks in anticipation of or extraneous to normal responsibilities, effectively copes with the unexpected.	starting new tasks and projects, as appropriate, to support district and school/department goals.
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Standard III: Communication. Communicates effectively, professionally and with a customer-focused approach; speaking or writing originated by a Guild member. Cultural Proficiency: Actively creates and maintains an environment in which students and staff of diverse backgrounds, identities, strengths, and challenges are respected

Indicators	Unsatisfactory	Needs Improvement	Proficient	Exemplary
III-A. Effective Written and Oral Communication	Demonstrates a pattern of ineffectual written, oral, and interpersonal communication.	Written, oral and interpersonal communication occasionally lacks clarity, timeliness, courtesy, or	All written, oral, and interpersonal communication produced is accurate, clear, concise, courteous, and timely.	Demonstrates proficiency AND models effective public demeanor and/or participation skills.

		precision.		
III-B. Culturally Proficient Communication	Demonstrates a pattern of failure to ensure communications are always respectful and demonstrate understanding of and sensitivity to cultural and other differences.	Demonstrates inconsistency in ensuring all communication is respectful and demonstrates an understanding and sensitivity to cultural and other differences.	Ensures that all communication is consistently respectful and demonstrates an understanding of and sensitivity to different languages, cultures and values represented.	Demonstrates proficiency AND serves as a model/resource for staff regarding culturally proficient communication.

Standard IV: Professionalism and Growth. The employee's conduct reflects good judgment and high standards of performance, behavior, and a willingness to grow through ongoing professional learning.

Indicators	Unsatisfactory	Needs Improvement	Proficient	Exemplary
IV-A. Professional Judgment	Demonstrates poor judgment and/or discloses confidential information inappropriately.	Occasionally demonstrates questionable judgment and sharing of confidential information.	Demonstrates sound judgment reflecting integrity, honesty, fairness, and trustworthiness and protects confidentiality appropriately.	Demonstrates proficiency AND serves as a model for others regarding professional judgment.
IV-B. Attendance and Punctuality	Demonstrates a pattern of problematic behavior regarding punctuality,	Exhibits some notable challenges with punctuality, attendance, or giving notice of time off.	Is punctual; follows attendance policy notice requirements.	Demonstrates proficiency AND ensures that vacation and personal leave is taken at a time that minimally impacts

	attendance or giving notice of time off.			the functioning of the department and/or school.
IV-C. Feedback and Growth	Demonstrates resistance to feedback related to performance and/or fails to use feedback to improve performance.	Has notable difficulty receiving feedback related to performance and/or using feedback to improve performance.	Responds receptively and constructively to feedback related to performance and uses feedback to improve performance.	Demonstrates proficiency AND models the use of feedback to personally improve.