

Performance
Evaluation
PLANNER

EXCEL ACADEMY



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School Goals

SUSTAINABLE GROWTH

Sustainable growth through strategic planning and optimizing resources in relationship to our budget. New student recruitment initiatives through community outreach, relationship building, community providers, demographic research and marketing through diverse mixed media.

RETENTION

Sustainably retaining students through high academic expectations, intervention, innovation, quality programs and collaboration. Staff retention through improvements and initiatives that increase positive culture, oversight, accountability, professional development and support.

QUALITY PROGRAMS

Offer students innovative personalized programs that offer flexibility, and independent learning. Empower individual teams to deliver diverse programs and pathways developed from data analysis of assessment and academic portfolios built on integrity, accountability and compliance.

PROFESSIONAL DEVELOPMENT

Growing, enhancing and developing skills in our staff. Defining and demonstrating roles and responsibilities, identifying strengths and weaknesses through a growth mindset evaluation platform. Providing methods of support including training and access to materials to enhance performance. Emphasizing how teamwork and using individual strengths contribute to success.

Performance Timeline

REVIEWER ORG 

ACTION	DUE DATE	DESCRIPTION
School Goals	AUG	The schools overall goals are developed to achieve success and streamline initiatives.
Supervisors, Managers and Administration to Review School Goals with staff	SEPT	All staff should be aware of school goals and supervisor, managers and Admin should translate how these goals are important to the specifics of their departments and individual roles

SUPERVISORS, MANAGERS AND ADMINISTRATORS SHOULD SET CLEAR EXPECTATIONS WITH STAFF AND UNDERSTAND RESOURCES AVAILABLE TOWARDS IMPROVING POOR PERFORMANCE AND ENSURING STAFF ARE MEETING EXPECTATIONS.

**** The following timeline and resources are suggested tools given by Human Resources. Each department leader should feel empowered to complete observations, reviews and engage in expectations and goal setting sessions as they see applicable to their staff and flow of their department.

It is mandatory for all supervisors to engage in AT LEAST one mid year performance review and one annual performance review of each staff member. Supervisors can use any tools they see applicable to complete these tasks; or at least use the HR provided materials attached.

ACTION	DUE DATE	DESCRIPTION
Mid-year assessments	JAN	<ol style="list-style-type: none"> 1. Lead Teacher mentors will complete an information peer review form for each ToR in their group. CM's will meet with the Lead CM and Program Specialist or leadership team member as assigned and review assessment form, goals and performance. 2. All other staff will meet with supervisors to conduct informal midyear assessment. These semi annual evaluations will be a check in to identify areas of improvement. Assessments will be verbally reviewed and expectations re-defined. 3. Administrators will review the assessment documents from all departments and schedule 1:1 with staff as applicable based on performance deficits.
New Hire Probationary Observations	MAR	New hires will be formally observed and assessed based on the Observation/Coaching form; areas of strength and weakness will be documented and discussed.
Evaluation Tracking Sheets and Error and Achievement Submissions Due	MAY	All applicable department leads will complete and submit " Evaluation Tracking Sheet to contribute to overall staff evaluation and collect data in performance
Annual self-assessment	APR	Each individual staff member will complete a self-assessment to indicate how they view their annual performance and goal achievement was.
Annual Employee Assessment	MAY	Using informal mid-year assessments, peer feedback, observations and evaluation tracking forms, AD's will conduct the final evaluation of staff members.
Employee Reviews 1:1 (if applicable)	MAY/ JUNE	Staff members with performance concerns, scheduled PIP's and non-renewal agreements will be notified via 1:1 meeting with supervisor and Human Resources.
Overall Employee Evaluations emailed and uploaded to Paycom	JUNE	

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C's of Documentation

Clear

When documenting performance concerns and situations be clear in your notes, conference summary, counseling form or written reprimand. Using all available details, get as specific as possible using dates, times and major details.

Concise

Stick to the details and the facts; avoid using judgment or conclusions.

Correct

Make sure all your information is correct and corroborated through data, evidence or details provided by other employees, parents etc.

Complete

Make sure to close the loop. When addressing specific performance concerns, discuss and outline solution timelines; make sure follow up is scheduled and completed. Always lean into HR so support!

Communication

Keep dialog open, engage in follow up conversations, comprehension checks and progress updates. Make sure your expectations are not only always properly communicated but comprehensive.

Standard ASSESSMENTS

The Google assessment forms below should be completed by the employee's supervisor and then reviewed department Admin oversight.



CERTIFICATED

- [Certificated ToR Assessment](#)
- [Certificated Virtual Assessment](#)
- [Certificated Special Education Leadership Assessment](#)
- [Certificated Special Education Teacher/ Case Manager Assessment](#)
- [Certificated Administrator Assessment](#)
- [Certificated Leadership Assessment](#)



CLASSIFIED

- [Classified Administrator Assessment](#)
- [Classified Leadership Assessment](#)
- [Classified Assessment](#)

The Google assessment forms below should be completed by the employee themselves. This will be the exact assessment that will be conducted by the supervisor so performance analysis can be directly compared.



CERTIFICATED

- [Certificated ToR Self-Assessment](#)
- [Certificated Virtual Self Assessment](#)
- [Certificated Special Education Leadership Self - Assessment](#)
- [Certificated Special Education Teacher/ Case Manager Self- Assessment](#)
- [Certificated Administrator Self Assessment](#)
- [Certificate Leadership Self- Assessment](#)



CLASSIFIED

- [Classified Self- Assessment](#)

HR PERFORMANCE RESOURCES

CLICK TO VIEW & DOWNLOAD



[Evaluation Tracking Sheet](#)



[Performance Improvement Plan](#)



[Performance Success Plan](#)



[Written Reprimand Form](#)

To schedule 1:1 performance support from HR please use the following link

[Performance Support](#)



Inspire



I nitiate

Reach out to initiate the contact

N otice

Objective observation of the behavior: "I am noticing that..."

S upport

Give specific examples of behavior.

P robe

Open-ended questions (to prompt reflection)
"What is getting in the way of you..."

I nvite

To come up with a solution together.

R eview

Recap the conversation, agreements, and check for understanding

E nforce

Determine follow-up actions.

FRISK



[CLICK FOR MORE INFORMATION](#)

Scope

The primary purpose of FRISK is to increase an evaluator's skill, knowledge and ability to address below-standard employee performance.

Many evaluators fear clear, honest direct communication with below-standard performing employees. As a result feedback is often replete with diluted assessments of performance problems. This indirect approach sends mixed messages and only increases the employees chance for failure.

Evaluators must provide early, ongoing, meaningful counseling and support to employees to promote success. Employees must be willing to conform to legitimate and reasonable performance standards set by management.

Objectives

- Effective Positive Change
- Develop common institutional language to establish uniform feedback.
- Promote employee accountability
- Ensure legally sufficient documentation

Components

- Facts - describe the facts depicting the below standard performance
- Rule- identify the expectation or standard that should have been followed by the employee
- Impact- Describe the adverse impact of the employees substandard performance
- Suggestions/ Directions for Improvement- identify what the employee should do to improve or correct the substandard performance. Provide suggestions and directions for improvement
- Knowledge- Ensure the employee has the knowledge of applicable personnel file rights and where all corrective documentation will be placed.



PERFORMANCE IMPROVEMENT PROCESS

Supervisors should create team check-ins as they deem necessary. As team members and roles may require different levels of support and collaboration frequency may vary. Suggestions for performance would be twice a year (mid and annual).

Supervisors should clearly define expectations and roles and responsibility early and frequently.

Supervisors should help individual team members understand school goals and always alert and document staff immediately and frequently in areas of improvement.

Typically, the first issue will be accompanied with a verbal counseling, second issue accompanied with a written reprimand and third & fourth situation is grounds for additional written reprimand, PIP and review for termination. If the situation is deemed applicable the team members can be terminated at any point within the process.

- Verbal Warning/Counseling with Conference Summary
- Written Reprimand/ PIP of PSP
- Written Reprimand/ Review for Termination

***** This is a suggested process for performance, employees can be released at any point if deemed necessary in an at-will organization.*

During annual performance assessments supervisors should communicate and document all performance improvements suggested and discussed. Any issues during the semi-annual assessment should again be discussed during the annual assessment and status of improvement monitored.

During the annual assessment period Supervisors should reiterate all documented performance improvement items discussed during semi-annual check ins and how progress was made to complete the year. Supervisors will review the individual performance and discuss and document progress made, goals achieved and improvements that need to be made.



NOTICE OF:

VERBAL COUNSELING X

WRITTEN WARNING

Employee:	Date:
Job Title:	Supervisor:
Location:	Department:

This disciplinary action is being taken for the following reasons:

<input type="checkbox"/>	Harassment - page __	<input type="checkbox"/>	Workplace Violence - page __
<input type="checkbox"/>	Conflicts of Interest - page __	<input type="checkbox"/>	Drug-Free Workplace - page __
<input type="checkbox"/>	Unauthorized Overtime - page __	<input type="checkbox"/>	Social Media - page __
<input type="checkbox"/>	Meal/Rest Break- page __	<input type="checkbox"/>	Standards of Conduct - page __
<input type="checkbox"/>	Timekeeping - page __	<input type="checkbox"/>	Electronic Communication - page __
<input type="checkbox"/>	Paid Time Off - page __	<input type="checkbox"/>	Computer Usage & Privacy - page __
<input type="checkbox"/>	Punctuality & Attendance - page __	<input type="checkbox"/>	Prohibited Conduct - page __
<input type="checkbox"/>	Personal Appearance/Conduct-page __	<input type="checkbox"/>	Other: _____
<input type="checkbox"/>	Staff/Student Relations - page __	<input type="checkbox"/>	Other: _____

Violations of Job Description Essential Functions/Duties/Responsibilities (describe/list below):

<input type="checkbox"/>	_____	<input type="checkbox"/>	_____
<input type="checkbox"/>	_____	<input type="checkbox"/>	_____

Explanation and/or details of infraction (attach additional pages if needed):

There must be immediate and sustained improvement as follows:

I understand my employment remains at will. The above has been discussed with me by my supervisor. I understand the contents and acknowledge and understand the corrective action required. I also acknowledge and understand the potential consequences of non-compliance which may include further disciplinary action including termination. I understand my signature does not indicate agreement and that refusal to sign will not invalidate this disciplinary action.

Signatures:

Employee: _____

Date: _____

Supervisor: _____

Date: _____

Human Resources: _____

Date: _____

DATE :

MONTHLY GOALS

WEEK 1	WEEK 2	WEEK 3	WEEK 4

WEEK 5

TOP GOALS

Notes : _____
