

ADMINISTRATIVE CIRCULAR NO. 17
Office of the Chief of Human Resources

SAN DIEGO UNIFIED SCHOOL DISTRICT

Date: September 6, 2013

To: Area Superintendents, School Principals, Vice Principals, Division and Department Heads, Child Development Center Administrators, and San Diego Education Association Representatives

Subject: CERTIFICATED STAFF PERFORMANCE EVALUATION

Department and/or Persons Concerned: Certificated Staff

Due Date: **Traditional work year:** Second-year probationary employees due February 21, 2014. Permanent, first-year probationary employees, and temporary contract employees (leave replacement, restricted and provisional level credential status) due April 30, 2014.
Year-round schools: Second-year probationary employees due February 21, 2014. Permanent, first-year probationary employees, and temporary contract employees (leave replacement, restricted and provisional level credential status) due May 15, 2014.

Action Requested: Evaluate certificated staff by due dates. Notify Human Resource Services Division (HRSD) of corrections to staffing report of evaluated employee.

Brief Explanation:

The evaluation of teachers and other certificated employees is one of the most important responsibilities of management personnel. Your cooperation is essential to ensure that significant, challenging objectives are established; the degree of achievement is carefully evaluated; and the process takes place within the timelines established by the collective negotiations contract. Attachment 1, "Certificated Evaluation Timelines – 2013-2014 School Year," will assist you in scheduling each step of this process on your calendar to meet contract deadlines.

Please consider the following points as you administer this year's evaluation cycle:

1. All probationary and temporary contract employees on your staff (leave replacement, restricted, intern, and provisional level credential status) must be evaluated. Permanent employees, whose performance has previously been evaluated as effective, are evaluated at least every other year. Probationary employees are evaluated each year. A five-year evaluation cycle may be considered with mutual consent.
2. For the evaluation process, please refer to Article 14 in the Collective Negotiations Contract for the certificated bargaining unit before beginning the evaluation process.

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3. **For second-year probationary employees, the due date for final evaluations is on or before February 21, 2014.** In order to meet timelines for Board of Education approval, it is important that HRSD receive, **no later than February 21, 2014**, the final evaluation report for any second-year probationary employee who receives a less-than-effective evaluation.
4. Written formal evaluations for permanent certificated staff, first-year probationary, leave replacements, interns, restricted, and provisional level credential employees (which include Provisional Intern Permit, Short Term Staff Permit, District and University Interns) must be completed **on or before April 30, 2014** for traditional sites and **May 15, 2014**, for year-round sites. Refer to Attachment 1 for specific timelines including those whose performance has been evaluated as “requires improvement” or “unsatisfactory” during the previous school year.
5. The required performance evaluation forms (see Attachments 2, 3, and 4) can be reproduced as necessary or can be downloaded from the District’s website, www.sandi.net via the link “For District Staff.” Select the Principal’s Page and click on “Forms,” and then “HR forms.”
6. Any employee who receives a less-than-effective rating on **ANY** of the evaluation elements **MUST** be counseled on the specific objective(s) and criteria where progress is necessary and **MUST** be provided with a written progress check and remediation plan, which include the supervisor’s role in assisting the employee and a timeline for monitoring the employee’s progress. The conference must be held **no later than November 19, 2013** (traditional schools) or **November 4, 2013** (year-round schools) for second-year probationary teachers; no later than **February 10, 2014** (traditional schools) or **February 5, 2014** (year-round schools) for other certificated staff. (Article 14, Section 14.6.3 Progress Check and Remediation.) The assigned Human Resources Officer in HRSD should be contacted as soon as the evaluator suspects that an employee may receive a less-than-effective evaluation.
7. For samples and guides on classroom observations, please refer to the materials provided in the observation and evaluation manual. Be specific in your comments and remember to record the date, time and length of your observation. Remember to discuss your observation with the employee and provide him/her with a copy of your written observation statement within approximately 10 workdays of your observation. The employee should sign and date the supervisor's copy of the observation, acknowledging receipt and placement in the site file.
8. Send the original completed and signed copies of the Summary Evaluation Report forms for each of the teachers evaluated directly to HRSD, Room 1241, Eugene Brucker Education Center. Evaluation worksheets and other materials should be retained at the school site. If the Summary Evaluation Report form is marked **less-than-effective**, attach the progress check and remediation plan (or Counseling and Assistance Plan), Evaluation Worksheets, the Performance Evaluation Addendum form, and the written observation statement and send to the appropriate Area Superintendent for signature as reviewer of the evaluation.

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9. For Alternative Evaluation process, refer to Collective Negotiations Contract, Article 14, and Section 14.7.2. Evaluators contemplating this process should contact the Human Resources Officer in HRSD for further assistance.
10. The certificated evaluation report is available via PeopleSoft's Human Resources menu. Navigation to the report is: Workforce Administration, Workforce Reports, Certificated Evaluations. The step-by-step instructions to run this report are attached to this circular, (see Attachment 5) and are available on the HRSD website in the PeopleSoft HCM 8.9 job aids.

Due to the large volume of staffing that occurs at the conclusion of summer, including post and bid, the evaluation report may be incomplete and/or contain inaccurate information. Newly assigned staff may not be included on this initial report. It is recommended that you run the evaluation report on a weekly basis to assure accuracy.

For questions regarding the electronic evaluation report, please call your HRSD contact listed below:

Area 1, 2, 3, and 4 **Ester Victorio** **619-725-8114 evictorio@sandi.net**

Area 5, 6, and Student Services **Theresa Chowdhury** **619-725-8012 tchowdhury@sandi.net**

APPROVED:



Jeannie Steeg
Interim Chief Human Resources Officer

JS:bn

Attachments (5)

- #1 – Evaluation Timelines
- #2 – Summary Evaluation Report
- #3 – Evaluation Worksheet
- #4 – Evaluation Addendum
- #5 – How to Run Evaluation Report

Distribution: Lists A, B, C, D, E, F, H, and S

CERTIFICATED EVALUATION TIMELINES

2013-2014 SCHOOL YEAR

For SDEA Unit Members Working 182 Days on the Traditional or Year-Round Calendar

STEPS IN CERTIFICATED EVALUATION PROCESS	TRADITIONAL CALENDAR	YEAR-ROUND CALENDAR
Staff Meeting (1 st 4 weeks of pupil attendance)	September 3, 2013 - September 27, 2013	September 3, 2013 - September 27, 2013
Objectives/Assessment Discussion Conference (35 calendar days after school starts)	October 8, 2013	October 8, 2013
Employee Turns In Objectives To Supervisor (10 work days after conference)	October 22, 2013	October 22, 2013
Supervisor Review of Objectives (Must approve or disapprove within 10 work days)	November 5, 2013	November 5, 2013
Last Day Progress Check/ Remediation Plan For Prob 2 (50 work days before summary evaluation report)	November 19, 2013	November 4, 2013
Last Day Progress Check/ Remediation Plan For Prob 1 & Permanent (50 work days before summary evaluation report)	February 10, 2014	February 5, 2014
Summary Evaluation Draft For Prob 2 Discussion, meeting, Then final copy (3 rd Friday of February) Due no later than	February 21, 2014	
Summary Evaluation Draft For Prob 1, Permanent, Leave Replacement, Restricted Discussion, meeting, then final copy (Last work day in April for traditional) Due no later than	April 30, 2014	May 15, 2014
Evaluation Due to Employee Not later than 30 calendar days prior to the last day of school	May 13, 2014	June 23, 2014

Earlier timelines are established for evaluation of certificated unit members whose performance has been evaluated as "requires improvement" or "unsatisfactory" during the previous school year (see Collective Bargaining Agreement).

Timelines may vary for unit members working an individual calendar.

SUMMARY EVALUATION REPORT

CLASSROOM TEACHERS

Reference: Collective Negotiations Contract, Article 14

SAN DIEGO UNIFIED SCHOOL DISTRICT

Employee Name	Employee ID Number	School/Location Name	Cost Center
Title Subject Area or Grade Level	Employee Status	<input type="checkbox"/> Regular Evaluation Year <input type="checkbox"/> Regular Evaluation Year (Progress Check and Remediation Plan)	<input type="checkbox"/> Special Evaluation

SECTION I: EVALUATION COMPONENTS

If any of the evaluation components are marked "Unsatisfactory" or "Requires Improvement," the requirements of section 14.6.3 (Progress Check and Remediation Plan) and/or 14.8.5 (Counseling and Assistance Plan) must be met, and a Performance Evaluation Addendum must be completed.

Unsatisfactory	Requires Improvement	Effective	
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	1. Progress of students toward established standards.
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	2. Instructional techniques and strategies.
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	3. Adherence to curricular objectives.
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	4. Establishment and maintenance of a suitable learning environment.
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	5. Performance of non-instructional duties and responsibilities.
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	6. Achievement of stated objectives.

SECTION II: COMMENTS BY EVALUATOR:

SECTION III: COMPOSITE EVALUATION: If any of the evaluation components are marked "Unsatisfactory" or "Requires Improvement," the requirements of section 14.6.3 (Progress Check and Remediation Plan) and/or 14.8.5 (Counseling and Assistance Plan) must be met, and a Performance Evaluation Addendum must be completed.

Unsatisfactory Requires Improvement Effective

SECTION IV: COMMENTS BY EVALUATEE: Evaluatee may also attach additional written response

If additional comments are attached check here

EVALUATOR & SUPERVISOR	EVALUATEE	REVIEWER	
Signature _____	I certify that this report has been discussed with me. I understand my signature does not necessarily indicate agreement. A copy of this Summary Evaluation Report and all attached documents will be placed in your personnel file after ten (10) working days. You prepare may a response and have the response attached to this document.	Signature _____	
Title _____		Title _____	
Date _____		Signature _____	Date _____
		Date _____	

EVALUATION WORKSHEET

SAN DIEGO UNIFIED SCHOOL DISTRICT

Reference: Collective Negotiations Contract Article 14

Instructions: Use separate form for each objective. Evaluatee completes parts A, B, and C and forwards both copies of forms to evaluator. After review and/or the final decision on objectives, evaluator and evaluatee sign and return one copy to evaluatee (Article 14, Sections 14.3.2, 14.4 and 14.8.6.1). Prior to final evaluation conference, evaluatee completes part D for each objective. Evaluator and evaluatee review and sign worksheets when Summary Evaluation Report is completed. Worksheets will be placed in personnel file either at district or site location.

A. Objectives and Standards:

B. Assessment Techniques:

C. Support Requirements and/or Constraints:

D. Degree of Achievement:
Evaluatee:

D. Degree of Achievement:
Evaluator:

Parts A, B, and C

Part D

Evaluatee's Signature

Date

Evaluatee's Signature

Date

Evaluator's Signature

Date

Evaluator's Signature

Date

I certify that this report has been discussed with me. I understand my signature does not necessarily indicate agreement. A copy of this Summary Evaluation Report and all attached documents will be placed in your personnel file after ten (10) working days. I may prepare a response and have the response attached to this document.

PERFORMANCE EVALUATION ADDENDUM

San Diego Unified School District

Instructions: This form **MUST** be completed when elements of Section I and/or Section III of the Summary Evaluation Report contain an "Unsatisfactory" or "Requires Improvement" evaluation. The Addendum should be attached to the evaluatee's and supervisor's copy of the Summary Evaluation Report.

Employee Name

Employee ID Number

Location Name

Describe areas of performance considered unsatisfactory or requiring improvement.

Describe specific assistance provided (include dates).

Describe results of assistance (include dates).

EVALUATOR & SUPERVISOR

Signature

Title

Date

EVALUATEE

I certify that this report has been discussed with me.
I understand my signature does not necessarily indicate agreement. A copy of this Summary Evaluation Report and all attached documents will be placed in your personnel file after ten (10) working days. You prepare may a response and have the response attached to this document.

Signature

Date

REVIEWER

Signature

Title

Date

How to Run the Certificated Evaluations Report

1 Favorites | Main Menu > Workforce Administration > Workforce Reports > Certificated Evaluations

Certificated Evaluations

Find an Existing Value | Add a New Value 2

Run Control ID: Certificated_Evaluations 3

Add 4

Find an Existing Value | Add a New Value

1. Navigate to: *Workforce Administration > Workforce Reports > Certificated Evaluations*
2. Click the **Add a New Value** tab.
3. Enter a **Run Control ID**. Use your initials, or name the report. The **Run Control ID** can have no spaces.
4. Click the **Add** button.

Certificated Evals

Run Control ID: Certificated_Evaluations [Report Manager](#) [Process Monitor](#) 7 **Run**

Run Parameters

5 *Run Date: 09/01/2012 Enter Sept 1 of the current year (ex: 09/01/2000)

Department: 0261 Enter Dept ID 6

Save

5. Enter the **Run Date**. Enter September 1 of the current school year.
6. Enter your **Department**, or click the to view a list of departments from which to choose.
7. Click the **Run** button.

Process Scheduler Request

User ID: 123424 Run Control ID: Certificated_Evaluations

Server Name: PSNT 8 Run Date: 05/20/2013

Recurrence: Run Time: 12:32:13PM

Time Zone:

Select	Description	Process Name	Process Type	*Type	*Format	Distribution
<input checked="" type="checkbox"/>	Certificated Evaluations	SDHR276B	SQR Report	Web	PDF	Distribution

OK 9

8. Select **PSNT** from the drop-down menu for the **Server Name**.
9. Click the **OK** button.

Certificated Evals

Run Control ID: Certificated_Evaluations [Report Manager](#) [Process Monitor](#) 10 **Run**

Process Instance: 1171647

Run Parameters

*Run Date: 09/01/2012 Enter Sept 1 of the current year (ex: 09/01/2000)

Department: 0261 Enter Dept ID

Save

10. Note your **Process Instance** number and click the **Process Monitor** link.

Process List | Server List

View Process Request For

User ID: 122165 Type: [] Last [] 1 Days [] **11** Refresh

Server: [] Name: [] Instance: [] to []

Run Status: [] Distribution Status: [] Save On Refresh

Select	Instance	Seq	Process Type	Process Name	User	Run Date/Time	Run Status	Distribution Status	Details
<input type="checkbox"/>	1171647		SQR Report	SDHR276B	122165	05/14/2013 12:45:17PM PDT	Success	Posted	12

Go back to Certificated Evaluations

Save Notify

Process List | Server List

11. Click the **Refresh** button to update the **Run Status**.

12. When **Run Status** becomes “Success”, and **Distribution Status** becomes “Posted” click the **Details** link.

Process Detail

Process

Instance: 1171647 Type: SQR Report

Name: SDHR276B Description: Certificated Evaluations

Run Status: Success Distribution Status: Posted

Run Update Process

Run Control ID: Certificated_Evaluations

Location: Server

Server: PSNT

Recurrence:

Hold Request
 Queue Request
 Cancel Request
 Delete Request
 Restart Request

Date/Time Actions

Request Created On: 05/14/2013 12:47:17PM PDT [Parameters](#) Transfer

Run Anytime After: 05/14/2013 12:45:17PM PDT [Message Log](#)

Began Process At: 05/14/2013 12:47:35PM PDT [Batch Timings](#)

Ended Process At: 05/14/2013 12:48:33PM PDT [View Log/Trace](#) **13**

OK Cancel

13. Click the **View Log/Trace** link.

View Log/Trace

Report

Report ID: 786011 Process Instance: 1171647 [Message Log](#)

Name: SDHR276B Process Type: SQR Report

Run Status: Success

Certificated Evaluations

Distribution Details

Distribution Node: PSREPORTS Expiration Date: 05/21/2013

Name	File Size (bytes)	Datetime Created
SDHR276B_1171647.PDF 14	2,300	05/14/2013 12:48:33.433000PM PDT
SDHR276B_1171647.out	0	05/14/2013 12:48:33.433000PM PDT
SQR_SDHR276B_1171647.log	1,740	05/14/2013 12:48:33.433000PM PDT

Distribute To

Distribution ID Type	Distribution ID
User	122165

Return

14. Click the link that contains the **Process Instance** number, followed by **PDF** that you noted in **Step 10**.

Report ID: SDHR276B

PeopleSoft EMPLOYEE EVALUATIONS

Page No. 1

Run Date: 05/14/2013

Run Time: 12:48:27

Run As Of: 09/01/12

Emp ID	Name	Job Code/Title	Class/Cert	Months Worked	Union	ES Class	Eval Type
Department: 0261 Silver Gate Elementary							
151316	Chris Doe	2226 Teacher-Moderate/Severe	C 10 T	10	01	PER	Bi-Annual
100506	Chris Doe	2000 Regular Teacher	C 10 T	10	01	PER	Bi-Annual
1107897	Chris Doe	2000 Regular Teacher	C 10 T	10	01	PER	Bi-Annual
1136408	Chris Doe	2000 Regular Teacher	C 10 T	10	01	PER	Bi-Annual
1106317	Chris Doe	2000 Regular Teacher	C 10 T	10	01	PER	Bi-Annual
148414	Chris Doe	2000 Regular Teacher	C 10 T	10	01	PER	Annual
1109374	Chris Doe	2000 Regular Teacher	C 10 T JS	10	01	PER	Bi-Annual
114998	Chris Doe	2000 Regular Teacher	C 10 T	10	01	PER	Bi-Annual
1132396	Chris Doe	2106 Teacher-Mild/Moderate	C 10 T	10	01	PER	Bi-Annual
1150911	Chris Doe	2000 Regular Teacher	C 10 T	10	01	PER	Annual
151652	Chris Doe	2000 Regular Teacher	C 10 T	10	01	LVR	Annual
101520	Chris Doe	2000 Regular Teacher	C 10 T JS	10	01	PER	Bi-Annual
1110463	Chris Doe	2000 Regular Teacher	C 10 T	10	01	PER	Bi-Annual
133187	Chris Doe	2106 Teacher-Mild/Moderate	C 10 T	10	01	PER	Bi-Annual
1104598	Chris Doe	2000 Regular Teacher	C 10 T	10	01	PER	Bi-Annual
150259	Chris Doe	2000 Regular Teacher	C 10 T JS	10	01	PER	Annual

15. Your report will open in Adobe Acrobat Reader.