

SAN DIEGO UNIFIED SCHOOL DISTRICT

Date: August 29, 2016

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 16, 2017. Permanent, first-year probationary, and temporary contract employees (leave replacement, restricted, and provisional level credential status) due April 28, 2017.

Year-round schools: Second-year probationary employees due February 16, 2017. Permanent, first-year probationary, and temporary contract employees (leave replacement, restricted, and provisional level credential status) due May 15, 2017.

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 – 2016-2017 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, 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 for permanent employees.
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.
3. **For second-year probationary employees, the date for final evaluations is on or before February 16, 2017.** In order to meet timelines for Board of Education approval, it is important that HRSD receive the final evaluation report for any second-year probationary employee or intern who receives a less-than-effective evaluation **no later than February 16, 2017.**
4. Written formal evaluations for permanent certificated staff, first-year probationary, leave replacements, restricted, and provisional level credential employees (which include University Interns and Short Term

Staff Permit) must be completed **on or before April 28, 2017**, for traditional sites and **May 15, 2017**, 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.sandiegounified.org via the link “Staff Portal.” Select “Departments.” Then click on “Human Resources” and select “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 16, 2016** (traditional schools) or **November 2, 2016** (year-round schools) for second-year probationary and intern teachers; no later than **February 13, 2017** (traditional schools) or **February 13, 2017** (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. To find out which of your employees fall into this categories, run the certificated evaluation report. 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.
8. For samples and guides on classroom observations, please contact your assigned Human Resources Officer. Be specific in your comments on classroom observations 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.
9. 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.
10. 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.
11. After the final evaluations are completed, you must input the overall summary rating into Performance Management system in PeopleSoft by the end of the school year. The enclosed job aid provides explicit instructions on how to access this module.

For questions regarding the electronic evaluation report, please contact the numbers listed below:

Area 1, Student Services, and Youth Advocacy	Landen Villanueva	(619) 725- 8109	<u>lvillanueva2@sandi.net</u>
Area 2 and Leadership and Learning	Tina Tran	(619) 725- 7752	<u>ttran2@sandi.net</u>
Area 3 and Office of Secondary Schools	Tina Tran	(619) 725- 7752	<u>ttran2@sandi.net</u>
Area 4 and Central Office Special Education	Landen Villanueva	(619) 725- 8109	<u>lvillanueva2@sandi.net</u>
Area 5, Innovation Office, and Special Education Alternative Sites	Stacy Boland	(619) 725-8108	<u>sboland1@sandi.net</u>
Area 6, Early Childhood Education, and Family and Community Engagement	Stacy Boland	(619) 725-8108	<u>sboland1@sandi.net</u>

APPROVED:



Timothy Asfazardour
Chief Human Resources Officer

TA:bn

Attachments (6)

- #1 – Certificated Evaluation Timelines
- #2 – Summary Evaluation Report
- #3 – Certificated Evaluation Timeline Worksheet
- #4 – Performance Evaluation Addendum
- #5 – How to Run Evaluation Report
- #6 – Entering a Performance Evaluation Summary into PeopleSoft

CERTIFICATED EVALUATION TIMELINES

2016-2017 SCHOOL YEAR

For SDEA Unit Members Working 184 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)	August 29 - September 23, 2016	August 29 – September 23, 2016
Objectives/Assessment Discussion Conference (35 calendar days after school starts)	September 30, 2016	September 30, 2016
Employee Turns In Written Objectives, Criteria and Assessment Techniques To Supervisor (10 workdays after conference)	October 14, 2016	October 14, 2016
Supervisor Review of Objectives (Must approve or disapprove within 10 workdays)	October 28, 2016	October 28, 2016
Last Day Progress Check/ Remediation Plan For Prob 2 (50 work days before summary evaluation report)	November 16, 2016	November 2, 2016
Last Day Progress Check/ Remediation Plan For Prob 1, Intern & Permanent (50 work days before summary evaluation report)	February 13, 2017	February 13, 2017 *
Summary Evaluation Draft For Prob 2 Discussion, meeting, Then final copy (3 rd Friday of February) Due no later than	February 16, 2017	
Summary Evaluation Draft For Prob 1, Permanent, Leave Replacement, Restricted, Intern Discussion, meeting, then final copy (Last work day in April for traditional) Due no later than	April 28, 2017	May 15, 2017
Evaluation Due to Employee Not later than 30 calendar days prior to the last day of school	May 2, 2017	June 9, 2017
<p>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. * Date assumes site has three teacher preparation days during year-round spring break- May vary from site to site.</p>		

EVALUATION WORKSHEET

SAN DIEGO UNIFIED SCHOOL DISTRICT

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.

SAN DIEGO UNIFIED SCHOOL DISTRICT
Human Resource Services Division
Certificated Evaluation Timeline
2016-17 School Year

16-17 Employees for Stull Evaluation	Perm, Prob 2, Prob 1, Intern or Temp	Attended Staff Meeting (by 9/23)	Date of Individual Meeting (by 9/30)	Date Objectives Submitted (within 10 days of individual meeting; by 10/14)	Date of Objective Approval (within 10 days of receipt; by 10/28)	Remediation Plan Needed	Date Remediation Plan Delivered to Prob 2 (by 11/16-TR or 11/2-YR)	Date Remediation Plan Delivered to Perm, Prob 1, Intern or Temp (by 2/13-TR or 2/13-YR)	Non-reelection Conference with HRO	Date of Summary Evaluation Draft Given for Prob 2 (by 2/16)	Date of Summary Evaluation Draft Given for Prob 1, Intern, Temp or Perm (by 4/28 TR or 5/15 YR)	Date of Summary Evaluation (by 5/2-TR or 6/9-YR)	Entering Into Cycle? How Long?

16-17 Employees for Special Evaluation	Perm, Prob 2, Prob 1, Intern or Temp	Date of Pre-evaluation Conference (by 9/23)	Evaluation Worksheet Completed and Signed (within 15 calendar days of conference; by 10/6)	Date of Progress Check Conference (by 12/16)	Date of Summary Evaluation Conference for Prob or Inter (by 2/15)	Date of Summary Evaluation Conference for Perm (by 5/2-TR or 6/9-YR)

16-17 Employees for Special Expedited Evaluation	Perm, Prob 2, Prob 1, Intern or Temp	Date of Conference with Written Summary (reasonable amount of time prior to evaluation start date)	Date Evaluation Started (by 3/7-TR or 2/27-YR)	Date of Progress Check Conference	Date of Summary Evaluation Conference (by 5/2-TR or 6/9-YR)

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

Attachment 5

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 | Return to Search | Notify | Add | Update/Display

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 | Reset to Current Date/Time

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 | Return to Search | Notify | Add | Update/Display

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

Certificated Evaluations Report

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.

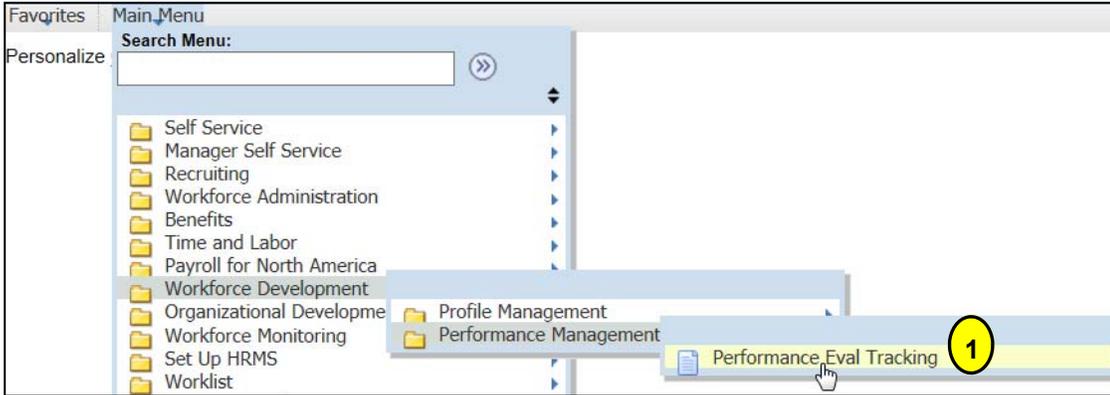
Entering a Performance Evaluation Summary into PeopleSoft

Once a performance evaluation is completed for any salaried employee, classified or certificated, the manager or evaluator enters the outcome of the evaluation into PeopleSoft as shown below.

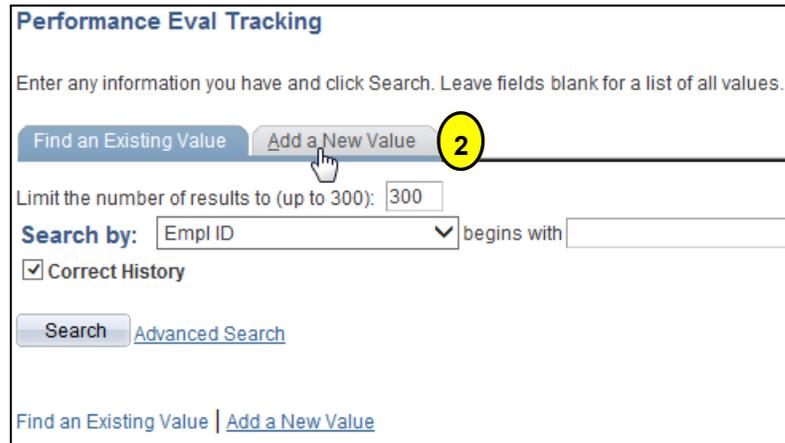
Attachment 6

1. In PeopleSoft HCM navigate to:

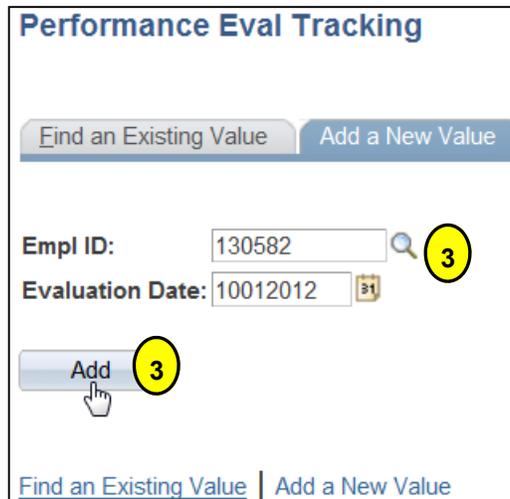
Workforce Development > Performance Management > Performance Eval Tracking



2. Click **Add a New Value**



3. Enter the **Empl ID** of the employee who was evaluated, and the **Evaluation Date** on which the performance evaluation was conducted. Click **Add**.



Entering a Performance Evaluation Summary into PeopleSoft

4. The Performance Evaluation Tracking page displays the salaried assignment(s) of the employee at the time the evaluation was conducted. Click the magnifying glass beside the **Performance Evaluation Form** field to select the evaluation form that was used to evaluate the employee.

Job Code	Job Title	FTE	Location	Location Description	Employee Class
1 6450M	Noon Duty Assistant	0.225000	0166A	Kumeyaay Elementary	Probationary Classif

Select one of the choices shown below:

Look Up

Select one of the following values:

- CADM Certified Administrator
- COTH Non-Classroom Certificated
- CTCH Classroom Teacher
- LNON Classified Non-Sup Non-Para
- LPRA Classified Paraprofessional
- LSUP Classified Supervisory

Cancel

5. If the evaluation was unscheduled (classified) or a special evaluation (certificated), select the checkbox. (If not, leave it blank.) Then select the overall performance rating. These fields will change depending on which performance evaluation form was selected in **Step 4** above.

Sample Classified Evaluation Form:

Unscheduled Report: 5

Classified Non-Sup Non-Para

5 Unsatisfactory Requires Improvement Meets Standards Exceeds Standards

Entering a Performance Evaluation Summary into PeopleSoft

Sample Certificated Evaluation Form:

Evaluation Summary

*Performance Evaluation Form Classroom Teacher

Special Eval/Expedited Special Eval: **5**

Classroom Teacher

5 Unsatisfactory Requires Improvement Effective Skip Year

Evaluator Supervisor / Rater

Evaluator Rater Job Code:

Last updated by:
Last Update Date/Time

Save Notify Add Update/Display Correct History

6. In the **Evaluator Supervisor / Rater** field, enter the employee ID of the person who evaluated or rated the employee. To search for the employee ID by name, click the magnifying glass beside the **Evaluator Supervisor/Rater** field, then click **Advanced Lookup** and type the last name of the evaluator. The evaluator's name, job code, and job title as of the Evaluation Date appears.

Evaluator Supervisor / Rater **6** Chris Doe

Evaluator Rater Job Code: 1305 Principal

7. Click **Save**. The employee ID and name of the last person to save the record appears at the bottom right, with the date and time the record was last saved.

Evaluator Supervisor / Rater Chris Doe

Evaluator Rater Job Code: 1305 Principal

Last updated by: 122165 Chris Doe

Last Update Date/Time 04/17/13 12:48:13PM

7 Save Notify Add Update/Display Correct History

The entry of the Performance Evaluation Summary is now complete

Performance Eval Tracking

Empl ID 130582 Chris Doe Evaluation Date 10/01/2012

Job Code	Job Title	FTE	Location	Location Description	Employee Class
1 8450M	Noon Duty Assistant		0.225000 0166A	Kumeyaay Elementary	Probationary Classif

Evaluation Summary

*Performance Evaluation Form Classified Non-Sup Non-Para

Unscheduled Report:

Classified Non-Sup Non-Para

Unsatisfactory Requires Improvement Meets Standards Exceeds Standards

Evaluator Supervisor / Rater Chris Doe

Evaluator Rater Job Code: 1305 Principal

Last updated by: 122165 Chris Doe

Last Update Date/Time 04/17/13 12:48:13PM

Save Notify Add Update/Display Correct History