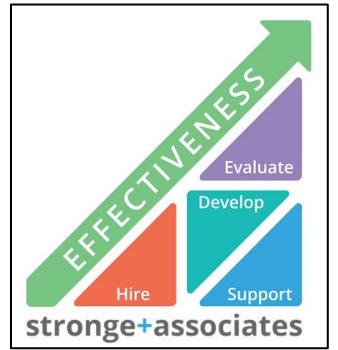

Stronge+



Educational Specialist Effectiveness Performance Evaluation System Handbook

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PART I: INTRODUCTION AND PROCESS

INTRODUCTION TO ESEPES



The Stronge Educational Specialist Effectiveness Performance Evaluation System (ESEPES) uses the Goals and Roles Performance Evaluation Model[®] (short title: Goals and Roles Model[®]) developed by Dr. James Stronge for collecting and presenting data to document performance based on well-defined job expectations. ESEPES provides a balance between structure and flexibility. It is prescriptive in that it defines common purposes and expectations, thereby guiding effective instructional practice. At the same time, it provides flexibility, thereby allowing for creativity and individual educational specialist initiative. The goal is to support the continuous growth and

development of each educational specialist by monitoring, analyzing, and applying pertinent data compiled within a system of meaningful feedback.

Who Are Educational Specialists?

The term educational specialist includes non-teaching, non-administrative education professionals who provide a multitude of support services to students, teachers, and parents. Educational specialists include counselors, nurses, librarians/media specialists, school psychologists, and others who have specialized training and offer a broad range of services to students. The key question, “With whom does the educational specialist work?” can help you determine which staff members belong to the educational specialist group. The term does not include non-certified, non-licensed staff such as clerical assistants or custodians.

Educational Specialist Position Categories:

- Pupil personnel services could include school counselors, school nurses, school psychologists, and social workers.
- Instructional support services could include library media specialists and instructional technology specialists.
- Special education services could include occupational therapists, physical therapists, and speech and language pathologists.

Purposes and Characteristics of ESEPES

The primary purposes and distinguishing characteristics of ESEPES are shown in Figures 1 and 2.

Figure 1: Primary Purposes of ESEPES

PRIMARY PURPOSES
Optimizes student learning and growth
Improves the quality of instruction by ensuring accountability for learner performance and educational specialist effectiveness
Contributes to successful achievement of the goals and objectives defined in the vision, mission, and goals of the school
Provides a basis for instructional improvement through productive educational specialist performance appraisal and professional growth
Encourages collaboration between the educational specialist and evaluator through an evaluation system that promotes self-growth, instructional effectiveness, and improvement of overall job performance

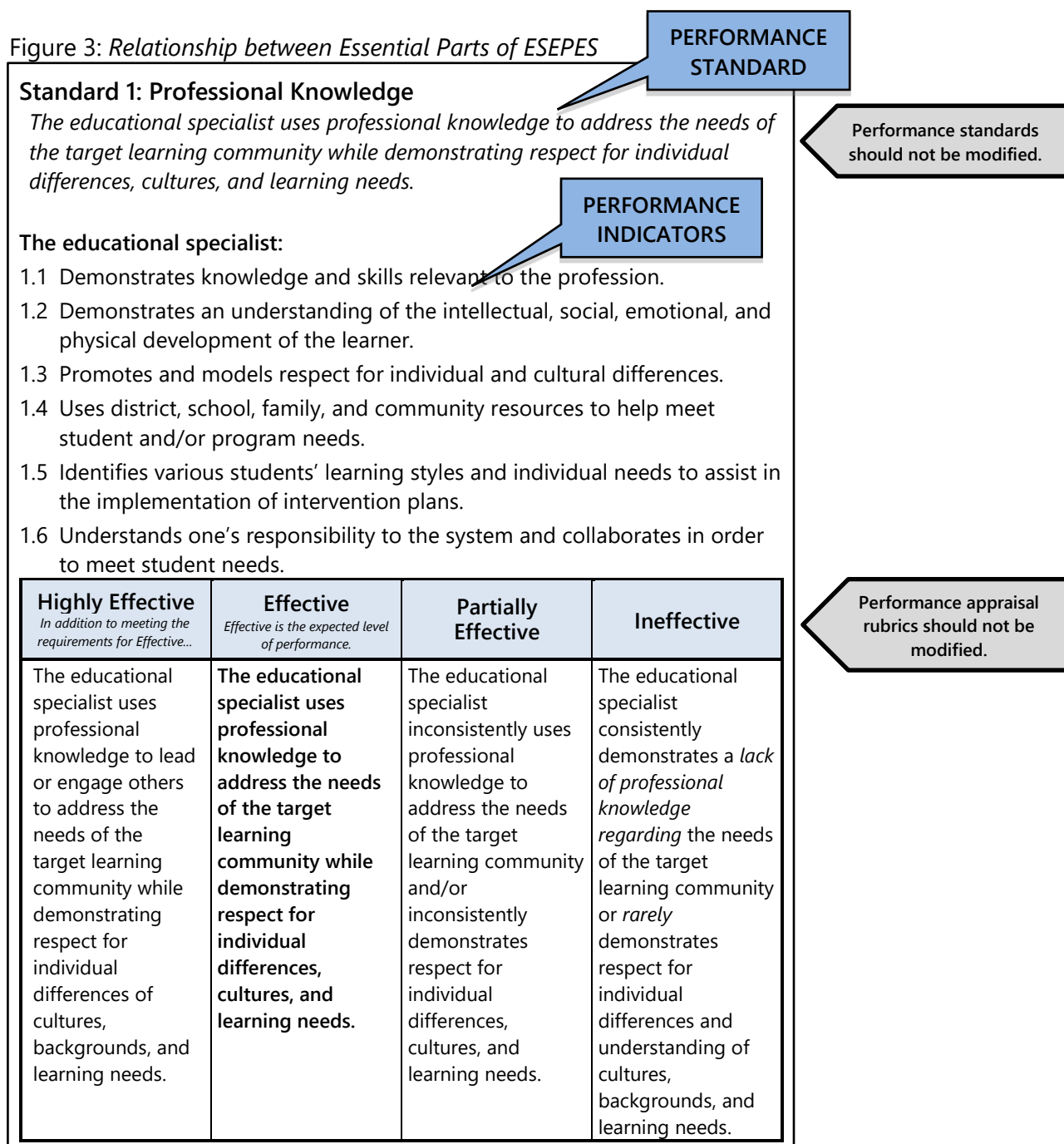
Figure 2: Distinguishing Characteristics of ESEPES

DISTINGUISHING CHARACTERISTICS
Focuses on the relationship between professional performance and improved learner achievement
Provides sample performance indicators for each of the educational specialist performance standards
Documents educational specialist performance based on multiple data sources
Provides procedures for conducting performance reviews that stress accountability, promote professional improvement, and increase the involvement of educational specialists in the evaluation process
Includes a support system for providing assistance when needed

Essential Components of ESEPES

Clearly defined professional responsibilities for educational specialists constitute the foundation for the Educational Specialist Effectiveness Performance Evaluation System. A fair and comprehensive evaluation system provides sufficient detail and accuracy so that both educational specialists and evaluators will reasonably understand their job expectations. ESEPES uses a two-tiered approach consisting of seven performance standards and multiple performance indicators, to define the expectations for educational specialist performance. Educational specialists will be rated on the performance standards using performance appraisal rubrics. The relationship between these components is depicted in Figure 3.

Figure 3: Relationship between Essential Parts of ESEPES



The *effective* column is bolded throughout the handbook as it is the expected level of performance.

Performance Standards

Performance standards refer to the major duties performed by an educational specialist. Figure 4 shows the seven performance standards in ESEPES that serve as the basis for an educational specialist's evaluation. Standards 1-6 relate to an educational specialist's practice whereas standard 7 focuses on the results of the educational specialist's work as evidenced by learner or program growth.

Figure 4: *Performance Standards*

	1. Professional Knowledge The educational specialist uses professional knowledge to address the needs of the target learning community while demonstrating respect for individual differences, cultures, and learning needs.		5. Communication and Collaboration The educational specialist communicates and collaborates appropriately with learners, families, staff, and the community to promote student learning and well-being.
	2. Program Planning and Management The educational specialist plans, coordinates, and manages programs and services consistent with established guidelines, policies, and procedures.		6. Professionalism The educational specialist demonstrates behavior consistent with legal, ethical, and professional standards, contributes to the profession, and engages in professional growth.
	3. Program Delivery The educational specialist uses professional knowledge to implement a variety of services for the targeted learning community.		7. Learner/Program Progress* The work of the educational specialist results in acceptable and measurable learner or program progress based on established standards and/or school goals.
	4. Assessment The educational specialist gathers, analyzes, and uses data to determine learner/program needs, measure learner/program progress, guide instruction and intervention, and provide timely feedback to learners, families, staff, and the community.		

* Standard 7 is optional.

Performance Indicators

Performance indicators help educational specialists and their evaluators clarify job expectations by providing samples of observable, tangible behaviors for each standard (see Part II). That is, the performance indicators are examples of the types of performance that will occur if a standard is being successfully met. The list of performance indicators is not exhaustive, is not intended to be prescriptive, and is not intended to be a checklist. All performance indicators may not be applicable to a particular work assignment. Further educational specialists are not expected to demonstrate each performance indicator. It should be noted that indicators in one standard may be closely related to indicators in another standard. This is because the standards, themselves, are not mutually exclusive and may have overlapping aspects. Figure 3, shown previously, depicts the sample performance indicators for the *Professional Knowledge* standard.

Ratings are made at the performance standard level, NOT at the performance indicator level.

Performance Appraisal Rubrics

The performance appraisal rubric is a behavioral summary scale that guides evaluators in assessing *how well* a standard is performed. It states the measure of performance expected of educational specialists and provides a qualitative description of performance at each level. In some instances, quantitative terms are included to augment the qualitative description. The resulting performance appraisal rubric provides a clearly delineated step-wise progression, moving from highest to lowest levels of performance. Each level is intended to be qualitatively superior to all lower levels. Educational specialists who earn a *highly effective* rating must meet the requirements for the *effective* level and go beyond it. Performance appraisal rubrics are provided to increase reliability among evaluators and to help educational specialists focus on ways to enhance their teaching practice. Part II includes rubrics related to each performance standard. Figure 3, shown previously, depicts the performance appraisal rubric for the *Professional Knowledge* standard.

The description provided in the *effective* level of the rubric is the actual performance standard; thus *effective* is the expected level of performance.

Responsibilities of Site Administrators

The term site administrator will be used for principals/supervisors. The site administrator has the ultimate responsibility for ensuring that ESEPES is executed faithfully and effectively in the school. For an evaluation system to be meaningful, it must provide its users with relevant and timely feedback, thus administrators other than the site administrator, such as assistant principals, may be designated by the evaluator to supervise, monitor, and assist with the multiple data source collection. The site administrator remains informed of the assessment process and is responsible for the summative evaluation of the educational specialists.

EDUCATIONAL SPECIALIST PRACTICE MEASURES



A fair and equitable performance evaluation system for the role of a professional acknowledges the complexities of the job. Thus, multiple data sources are necessary to provide for a comprehensive and authentic “performance portrait” of the educational specialist’s work. Observations, the documentation log, and student surveys provide valuable information for the practice portion of an educational specialist’s evaluation. Measures of learner/program progress, while typically associated with outcome measures, are also listed in Figure 5 as they may provide supplemental information related to the performance standards.

Figure 5: *Data Sources for Educational Specialist Evaluation*

Data Source	Description
Observations	Formal classroom observations focus directly on the educational specialist performance standards. Informal observations or walk-throughs are intended to provide more frequent information on a wider variety of contributions made by the educational specialist. Evaluators are encouraged to conduct observations by visiting classrooms, observing instruction/client interaction, and/or observing work in non-classroom settings.
Documentation Log	The Documentation Log includes both specific required artifacts and educational specialist-selected artifacts that provide evidence of meeting performance standards. Educational specialists should submit authentic artifacts created in their day-to-day work and should reflect on them as appropriate.
Client Surveys	Surveys provide information to the educational specialists about perceptions of job performance and may assist with professional goal-setting. The actual survey responses are seen only by the educational specialist who prepares a survey summary for inclusion in the Documentation Log.
Measures of Learner/Program Progress	Depending on grade level, content area, and students' ability level, appropriate measures of performance are identified to provide information on learning/program gains. In addition, Student Learning/Program Objectives and their attainment provide another important source of information on learner/program progress.

Observations *NJ regulations in this area can change annually. Please refer to the NJ TEPES Appendix for the latest update.*

Observations are intended to provide information on a wide variety of contributions made by educational specialists in the classroom or to the school community as a whole. Administrators are continually observing in their schools by walking through classrooms and non-instructional spaces, attending meetings, and participating in school activities. These day-to-day observations are not necessarily noted in writing, but they do serve as a source of information.

The timeline, number, and duration of observations described in this section are minimum requirements for ESEPES. These aspects may be modified to meet school requirements.

Formal Observations

Classroom observations provide key information on several of the performance standards. New educational specialists will be observed at least three times per year. These observations may be announced or unannounced. It is recommended that two of these observations occur prior to the end of the first semester and the third by March 1. Veteran educational specialists will be observed at least once per year. Additional observations for any staff member will be at the site administrator's discretion. All observations will include a classroom observation of at least 30 consecutive minutes and a post-observation conference. A pre-observation conference may be conducted at the request of the educational specialist or the administrator. A sample pre-observation conference form is shown in Part III.

Schools should determine the criteria for what constitutes a "new" versus "veteran" educational specialist.

Evaluators use observations as one source of information to determine whether an educational specialist is meeting the performance standards. The evaluator provides feedback about the observation using one of the observation or feedback forms (see Part III) and through a post-observation conference with the educational specialist.

Other observation forms may be used at the evaluator's discretion.

Informal Observations



Additional informal observations may be conducted for any educational specialist at the discretion of the evaluator. These informal observations may be of shorter duration and may be documented using an appropriate observation or feedback form (see Part III). Evaluators will provide feedback from informal observations through any appropriate means.

Observation documentation will be given to the educational specialist and one copy will be maintained by the evaluator for the entire evaluation cycle to document growth and development.

Documentation Log

The purpose of the Documentation Log (see Part III) is to provide evidence of performance related to specific standards. Some items may be required by the school; however, other documents may be included upon evaluator request and/or educational specialist choice. These documents provide administrators with information they likely would not receive in an observation. Specifically, the Documentation Log should include artifacts that result from the day-to-day work of the educational specialists; artifacts should not be created solely for the purpose of evaluation. The Documentation Log provides the educational specialist with an opportunity for self-reflection, allows demonstration of quality work, and creates a basis for two-way communication with an evaluator. The emphasis is on the quality of work, not the quantity of materials presented. A cover sheet (see Part III) should be placed at the front of the required and optional documents if the Documentation Log is submitted in hard-copy.

Schools should make clear their expectations related to the number and format (hard-copy or electronic) of artifacts.

The reflective aspect of artifacts provides one of the key benefits for educational specialists. Educational specialists should be encouraged to reflect on how the artifact was used and how it might be improved.

Administrators are free to maintain their own documentation (e.g., evaluator notes or running records) relative to the educational specialist's performance.

The Documentation Log is a work in progress and should be updated throughout the evaluation cycle, but should be available for review at any time per the administrator's request. At a minimum, evaluators will review and provide

feedback on the Documentation Log annually. Additionally, new educational specialists will meet with administrators and/or evaluators to review their Documentation Log by the end of the first semester. Figure 6 shows examples of items that may be included in the Documentation Log. This is not an all-inclusive list.

Figure 6: *Sample Items in a Documentation Log*

Perf. Stnd.	Examples of Evidence	Schools are free to add additional required items or to modify the <i>Examples of Evidence</i> listing.
Professional Knowledge	• Transcripts of coursework • Annotated Professional Development certificates • Annotated list of instructional activities • Lesson/intervention plan • Journals/notes that represent reflective thinking and professional growth • Samples of innovative approaches developed by educational specialist • Behavior plans	
Program Planning and Management	• Differentiation in lesson planning and practice • Analysis of learner or classroom assessment • Data from the circulation system for planning for program management • Data driven curriculum revision work, such as: - Sample lesson, unit or treatment plan - Course syllabus - Intervention plan - Substitute lesson plan - Annotated learning objectives - Schedule ESEPEs Requirement: Evidence of using data about student learning to guide planning and instruction	
Program Delivery	• Educational specialist-specific resources based on the needs of the community - Reading Specialist: list of interventions - Nurse: medical community links - Media Specialist: technology available - Social Worker: Record of home visits - Instructional Coach: record of interventions throughout school ESEPEs Requirement: Service or Program Log	Educational specialists should be encouraged to collaborate on the types of artifacts they may wish to submit based on their specialty area.
Assessment	• Samples of baseline and periodic assessments and analysis • Progress reports • Summary of assessment procedures • Notifications made on a modified intervention and/or program based on feedback • Graphs or tables of student results • Records within electronic curriculum mapping tool • Brief report describing your record keeping system and how it is used to monitor student progress • Copy of scoring rubrics • Photographs or photocopies of student work with written comments • Samples of educational reports, progress reports or letters prepared for parents or students • Copy of disaggregated analysis of student achievement scores on standardized test • Copy of learner' journals of self-reflection and self-monitoring ESEPEs Requirement: Data demonstrating program and/or intervention effectiveness	

Perf. Stnd.	Examples of Evidence
Communication and Collaboration	• Examples of collaborative work with peers • Other evidence of communication with learners, families, colleagues and community ESEPES Requirement: Communication Log
Professionalism	• Record of professional development taken or given • Client survey summary information ESEPES Requirement: Evidence of commitment to professional growth; client survey summary information
Learner/Program Progress	ESEPES Requirement: Student Learning Objective document – Revised at midterm and end of year

Client Surveys

The term *client* may refer to the learners, parents, teachers, other professional colleagues, and/or administrators with whom the educational specialists work throughout the school year. The purpose of the client survey is to collect information that will help educational specialists reflect on their practice (i.e., for formative evaluation); in other words, to provide feedback directly to the educational specialist for growth and development. The client survey may provide information that may not be accurately obtained in observations.

Student Surveys are optional, but highly recommended, as they provide educational specialists with the perception of the receivers of their services.

Four different versions of the learner survey are provided to reflect developmental differences, as well as an adult client survey, and a family survey. Educational specialists should survey their clients each semester. To ensure appropriate and meaningful survey feedback, the type of client survey used will be determined by the educational specialist and evaluator. Educational specialists may add additional questions to the surveys at their discretion.

Survey questions address the educational specialist standards and have been written at the appropriate readability level using the Flesch-Kincaid Readability Scale.

The educational specialist retains sole access to the results of the client surveys, but should include the *Client Survey Summary* (see Part III) in the Documentation Log.

Self-Assessment

At the beginning of the school year, it is highly recommended that educational specialists conduct a self-assessment of professional practice to reflect on their strengths, areas for improvement, and strategies for growth. Educational specialists should consider all relevant information, including previous feedback from their evaluator, previous survey results, and learner/program growth measures. Based on areas that need improvement, educational specialists should consider developing professional practice goals which they can share with their evaluator for ideas on strategies they might consider to help achieve the goal. A sample self-assessment form is in Part III.

Self-assessment is an optional, but highly recommended practice.

STUDENT OUTCOME MEASURES

Multiple Measures *NJ regulations in this area can change annually. Please refer to the NJ TEPEs Appendix for the latest update.*

In the ESEPES model, optional performance standard 7, Learner/Program Progress, is used as an organizing framework to incorporate various measures of learner/program growth. It is important to note that the rating on this performance standard should never be based on a single measure of learner/program progress. Quantitative measures of growth based on validated achievement measures that already are being used locally should be considered when determining local growth measures. If using this standard, schools should provide explicit guidance on the type of student outcome measures that may be used, the weighting of these measures, and decision rules for their implementation.

Schools should modify this portion of the handbook to reflect applicable guidance.

Student Learning/Program Objectives¹

One approach to linking learner progress to educational specialist performance involves building the capacity for educational specialists and their evaluators to interpret data so that target objectives for learner improvement can be set. Setting learning/program objectives based squarely on learner performance is a powerful way to enhance professional performance and, in turn, positively impact learner achievement. Student learning/program objectives are designed to improve learner progress or program outcomes.

The description in this section illustrates a practical way of implementing this process.

¹ Portions of this section were adapted from Stronge, J. H., & Grant, L. W. (2009). *Student achievement goal setting: Using data to improve teaching and learning*. Larchmont, NY: Eye on Education. Adapted with permission.

Educational specialists have a definite and powerful impact on learning and performance. Depending on grade level, content area, and learners' ability level, appropriate measures of learner performance are identified to provide information on learning gains. Performance measures may include standardized test results as well as other pertinent data sources. Educational specialists set objectives for improving learner/program progress based on the results of performance measures. The student learning/program objectives and their attainment constitute an important data source for evaluation.

The Intent of Student Learning/Program Objectives

One of the purposes of student learning/program objectives includes focusing attention on learner/program improvement. This process is based on determining baseline performance, developing strategies for improvement, monitoring progress and assessing results at the end of the academic year. Figure 7 specifies the intent of student learning/program objectives.

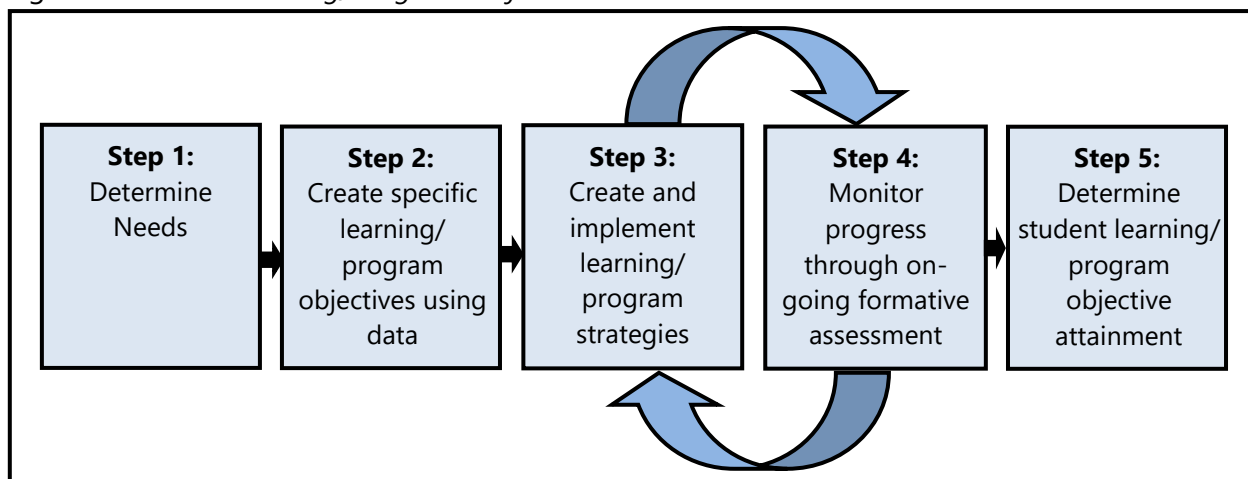
Figure 7: *Intent of Student Learning/Program Objectives*

	Make explicit the connection between teaching and learning
	Make instructional decisions based upon learner/program data
	Provide a tool for school improvement
	Increase the effectiveness of instruction via continuous professional growth
	Focus attention on learner results
	Increase learner achievement

Student Learning/Program Objectives Process

Creating student learning/program objectives involves several steps, beginning with knowing where learners are in relation to what is expected of them. Once that is known, the educational specialist can set specific, measurable objectives based on the demands of the curriculum, educational environment, and needs of the learners. The next part of the process is recursive in that the educational specialist creates and implements strategies and monitors progress. As progress is monitored, the educational specialist makes adjustments to the teaching and learning strategies. Finally, a summative judgment is made regarding learner/program outcomes for a specific period of time. Figure 8 depicts these steps.

Figure 8: *Student Learning/Program Objectives Process*¹



Step 1: Determine Needs

To begin this process, educational specialists need to determine the area on which to focus and how broad or narrow that focus should be. They should consider the skills and knowledge necessary for mastery, the understanding learners currently have, and the differences between learners.

A review of data from previous years, stakeholder needs, program/curricular needs, and/or school vision/mission can help educational specialists determine a focus area.

Once a focus is determined, educational specialists must choose how to measure the focus area. Using a pre-assessment or historic program data is necessary to obtain baseline data on each learner/program. Assessments should have as high a degree of validity and reliability as possible.

Assessments to consider include: criterion- or norm-referenced tests; standardized achievement tests; school adopted benchmark assessments, programmatic data, and authentic measures.

Assessments must be able to offer ways to pre-and post-assess learners' knowledge and skills, be cumulative in nature, and be linked to important curricular outcomes. Post-assessment data must be available prior to the summative evaluation.

Step 2: Create Specific Learning Objectives Based on Data

Each educational specialist, using the results of the pre-assessment or program data, sets an annual objective for improving learner/program outcomes. The objectives describe observable behavior and/or measurable results that will occur when an objective is achieved. The acronym SMART (Figure 9) is a useful way to self-assess an objective's feasibility and worth.

The terms used in the SMART acronym may be slightly different in various locations.

¹ This process, as laid out by Stronge, J.H., & Grant, L. H. (2009), is known as the Student Achievement Goal Setting Process; however, it may be modified to be the Student Learning/Program Objective Process.

Figure 9: *Acronym for Developing Student Learning/Program Objectives*

S pecific	The objective is focused, for example, by content area, by learners' needs.
M easurable	An appropriate instrument/measure is selected to assess the objective.
A ppropriate	The objective is within the educational specialist's control to effect change.
R ealistic, but rigorous	The objective is feasible for the educational specialist.
T ime-bound	The objective is contained within a single school year.

Figure 10 contains samples of the objectives that educational specialists may develop. They are intended to serve as models for how student learning/program objectives may be written. Based on the results of the pre-assessment or program data, educational specialists may consider writing whole group, tiered, individual, or program objectives.

Figure 10: *Sample Student Learning/Program Objectives*

Instructional Coach During the current school year, the percentage of higher-level questions asked by ninth grade teachers will increase from 20% to 85% as measured by the school-developed <i>Higher-Order Questions Evidence Rubric</i> and evidenced through walk-throughs. School Nurse During the current school year, the percent of teachers scoring "Proficient" (15/20) on the school-developed <i>Healthy Habits in the Classroom</i> assessment will increase from 40% to 90%.
--

Step 3: Create and Implement Learning/Program Strategies

As part of the student learning/program objective development process, educational specialists must determine strategies to help their learners/program achieve the objective. Figure 11 provides examples of strategies educational specialists might select to help improve learner/program outcomes.

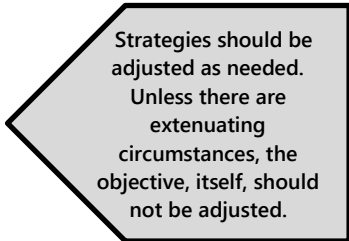
Figure 11: *Examples of Strategies to Improve Learner/Program Outcomes*

Modified teaching/work arrangement
Cooperative planning with master educational specialists, team members, department members
Demonstration lessons/service delivery by colleagues, curriculum specialists, educational specialist mentors
Visits to other classrooms
Use of a variety of instructional strategies
Focused classroom observation
Development of curricular supplements
Completion of workshops, conferences, coursework
Co-teaching; collaborative teaching

Research-based, high-yield instructional strategies should be used when possible.

Step 4: Monitor Progress through on-going Formative Assessment

Throughout the year, educational specialists should collect informal and formal data pertaining to the objective. They should reflect on the progress toward the achievement of the objective and the effectiveness of the strategies they have been using. If progress is not apparent from using a particular strategy, modifications to the strategy should be made or a new strategy should be implemented.



Strategies should be adjusted as needed. Unless there are extenuating circumstances, the objective, itself, should not be adjusted.

Step 5: Determine Student Learning/Program Objective Attainment

At the end of the course/year, educational specialists administer the post-assessment or collect program data and analyze the results. It is crucial that the post-assessment/program data measure the same content/skill/programmatic element that was used at the beginning of the year. These results are then compared with the established objective.

Administrative Process

Initial Approval of Objective

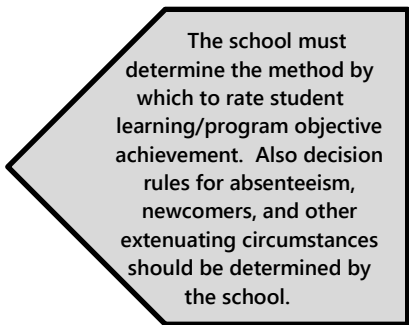
Educational specialists are responsible for submitting their objectives to their evaluator within the first month of the school year. The evaluator and the educational specialist then meet to discuss data from the initial assessment and to review the annual objective. A new objective is identified each year. The *Student Learning/Program Objective Progress Form* (see Part III) may be used for developing and assessing the annual objective.

Mid-Year Review of Objective

A mid-year review of progress on the objective is held for all educational specialists. At the principal's discretion, this review may be conducted through peer teams, coaching with the evaluator, sharing at a staff meeting or professional day, or in another format that promotes discussion, collegiality, and reflection. The mid-year review should be held within 30 days of the end of the first semester. It is the principal's responsibility to establish the format and select the time of the review.

End-of-Year Review of Objective

By the appropriate date, as determined by the principal, each educational specialist is responsible for assessing the growth made on the objective and for submitting documentation to the evaluator. The school must determine a method by which to rate student learning/program objective achievement as *highly*



The school must determine the method by which to rate student learning/program objective achievement. Also decision rules for absenteeism, newcomers, and other extenuating circumstances should be determined by the school.

effective, effective, partially effective, or ineffective. These criteria need to be established and communicated at the beginning of the year.

RATING EDUCATIONAL SPECIALIST PERFORMANCE



Formal evaluation of performance quality typically occurs at the summative evaluation stage, which comes at the end of the evaluation cycle (e.g., school year). The ratings for each performance standard are based on multiple sources of information and are completed only after pertinent data from all sources have been reviewed.

Educational specialists will be rated on each performance standard using a performance appraisal rubric (see Part II). As previously discussed, the rubric is a behavioral summary scale that describes performance levels for each educational specialist performance standard. The scale states the measure of performance expected of educational specialists and provides a general description of what each rating entails. Figure 12 explains the four levels of ratings.

Educational specialists are rated on performance standards, not performance indicators.

Educational specialists are expected to perform at the *effective* level.

Schools may modify the rating level names.

Figure 12: *Rating Levels*

Level	Description	Definition
Highly Effective	The educational specialist performing at this level maintains performance, accomplishments, and behaviors that <u>consistently and considerably</u> surpass the established performance standard, and does so in a manner that exemplifies the school's mission and goals. This rating is reserved for performance that is truly exemplary.	Exceptional performance: - sustains high performance over a period of time - consistently exhibits behaviors that have a strong positive impact on student learning and the school climate - serves as a role model to others
Effective	The educational specialist <u>consistently</u> meets the performance standard in a manner that is aligned with the school's mission and goals.	Proficient performance: - meets the requirements contained in the performance standard - exhibits behaviors that have a positive impact on student learning and the school climate - demonstrates willingness to learn and apply new skills

Level	Description	Definition
Partially Effective	The educational specialist's performance is <u>inconsistent</u> in meeting the established performance standard and/or in working toward the school's mission and goals. The educational specialist may be starting to exhibit desirable traits related to the standard, but has not yet reached the full level of proficiency expected (i.e., developing) or the educational specialist's performance is lacking in a particular area (i.e., needs improvement).	Developing/needs improvement performance: - requires support in meeting the performance standard - results in less than expected quality of student performance - leads to areas for educational specialist improvement being jointly identified and planned between the educational specialist and evaluator
Ineffective	The educational specialist <u>consistently performs below</u> the established performance standard or in a manner that is inconsistent with the school's mission and goals.	Unacceptable performance: - does not meet the requirements contained in the performance standard - results in minimal student learning - may contribute to a recommendation for the educational specialist not being considered for continued employment

Summative Evaluation

In making judgments for the summative assessment on each of the seven performance standards the evaluator should determine where the "preponderance of evidence" exists, based on evidence from the multiple data sources. Preponderance of evidence as used in this context is intended to mean the overall weight of evidence. In many instances, there will be performance evidence that may fit in more than one rating category. When aggregating the total set of data and making a summative decision, the question to be asked is, "In which rating category does the evidence best fit?"

Evaluators should consider all evidence from multiple data sources as well as the wording of the rubric to determine the appropriate rating level.

Evaluators will use the *Summative Performance Report* (Part III) to rate and provide evidence pertaining to each performance standard. The results of the evaluation will be discussed with the educational specialist at a summative evaluation conference.

Single Summative Rating

In addition to receiving a diagnostic rating for each of the seven performance standards, the educational specialist may receive a single summative evaluation rating at the conclusion of the evaluation cycle. This summative rating will reflect an overall evaluation rating for the employee. The intent is not to replace the diagnostic value of the seven performance standards; rather it is to provide an overall rating of the employee's performance.

A single summative rating is an optional calculation based on school guidance.

The overall summative rating will be judged to be *highly effective*, *effective*, *partially effective*, or *ineffective*.

Performance standard scores will be calculated using the following scale:

Ineffective = 1

Partially Effective = 2

Effective = 3

Highly Effective = 4

Figure 13 shows an example of how an average summative rating will be calculated.

Figure 13: *Example of Calculations*

Performance Standard	Performance Rating	Points
Standard 1	Highly Effective	4
Standard 2	Effective	3
Standard 3	Partially Effective	2
Standard 4	Effective	3
Standard 5	Highly Effective	4
Standard 6	Effective	3
Standard 7	Effective	3
Average Summative Rating		3.14

Schools that include optional Standard 7 should determine ahead of time how much it should weigh in the calculation.

The overall summative rating will be judged as *highly effective*, *effective*, *partially effective*, or *ineffective* using the following suggested range of scores:

Ineffective = 1.00 – 1.74

Partially Effective = 1.75 – 2.49

Effective = 2.50 – 3.49

Highly Effective = 3.50 – 4.00

Modifications to the summative rating range should be determined by the school prior to evaluation system implementation.

Note: Regardless of the overall total points earned, three or more *partially effective* ratings on individual performance standards will result in an overall rating of *partially effective* or *ineffective*. Similarly, one *ineffective* rating on any one performance standard may result in an overall *ineffective* rating.

Schools may modify these criteria.

Evaluation Schedule

All new educational specialists are expected to participate in a comprehensive orientation session at the beginning of the school year. The orientation consists of written and oral explanations of

ESEPES. All new educational specialists will be evaluated during their first and second years at the school; veteran educational specialists will receive a summative evaluation every other year.

Summative evaluations are to be completed before the last week of school. Figure 14 details the recommended evaluation schedule for all components of the evaluation system. If non-renewal of an educational specialist is anticipated, the summative evaluation ideally occurs at least one semester prior to the end of school year, provided that the educational specialist has had an opportunity to complete all of the *Performance Improvement Plan* activities (described in the next section of this handbook).

Prior to the beginning of the school year, schools should modify the evaluation schedule to meet their own needs.

Figure 14: *Recommended ESEPES Evaluation Schedule* **NJ regulations in this area can change annually. Please refer to the NJ TEPES Appendix for the latest update.**

Timeline	Activity for Professional Improvement	Task or Document	Responsibility of	
			Administrator	Educational Specialist
During the 1 st month	- ESEPES Orientation - Conduct optional self-assessment (all educational specialists) - Establish student learning/program objective (all educational specialists)	<i>Self-Assessment Form</i>	✓	✓
		<i>Student Learning/Program Objective Progress Form</i>	✓	✓
Before the end of the 1 st quarter	Observation of all new educational specialists	<i>Observation or Formative Feedback Form</i>	✓	
Before the end of the 2 nd quarter	Observation of all new educational specialists	<i>Observation or Formative Feedback Form</i>	✓	
Before end of the 1 st semester	Summary of client survey feedback (all educational specialists)	<i>Client Surveys and Client Survey Summary Form</i>		✓
Mid-year	- Mid-year review of student learning/program objective (all educational specialists) - Review of new educational specialists' Documentation Log	<i>Student Learning Objective Progress Form</i>	✓	✓
		<i>Documentation Log</i>	✓	✓
During the 2 nd semester	- Observation of all educational specialists - Summary of client survey feedback (all educational specialists)	<i>Observation or Formative Feedback Form</i>	✓	
		<i>Client Surveys and Client Survey Summary Form</i>		✓

Timeline	Activity for Professional Improvement	Task or Document	Responsibility of	
			Administrator	Educational Specialist
10 calendar days prior to summative evaluation date	- End-of-year review of student learning/program objective (all educational specialists) - Submit Documentation Log (all educational specialists)	<i>Student Learning/Program Objective Progress Form</i>	✓	✓
		<i>Documentation Log</i>	✓	✓
Before last week of school	Summative evaluation (all new educational specialists and all veteran educational specialists in their summative evaluation year)	<i>Summative Performance Report</i>	✓	

Documentation Records

Documentation records are maintained by both the educational specialist and the principal/evaluator for the entire evaluation period. If the educational specialist transfers among internal schools, the documentation may be forwarded to the receiving school's site administrator. At the end of an evaluation cycle, the evaluator retains copies of the *Student Learning/Program Objective Progress Form*, *Documentation Log Cover Sheet*, *Observation or Formative Feedback Form(s)*, and *Summative Performance Report* at the school/worksites.

IMPROVING PROFESSIONAL PERFORMANCE



Supporting educational specialists is essential to the success of schools. Many resources are needed to assist educational specialists in growing professionally. Sometimes additional support is required to help educational specialists develop so that they can meet the performance standards.

Two tools are provided in ESEPES that may be used at the discretion of the evaluator. The first is the *Support Dialogue*, a school-level discussion between the administrator and the educational specialist.

It is a conversation about performance needs in order to address the needs. The second is the *Performance Improvement Plan* which has a more formal structure and is used for notifying an educational specialist of *ineffective* performance. Both tools may be used for all educational specialists, regardless of contract status. The tools may be used independently of each other. Figure 15 shows the differences between the two processes.

Figure 15: *Tools to Improve Professional Performance*

	Support Dialogue	Performance Improvement Plan
Purpose	For educational specialists who are in need of additional support. These educational specialists attempt to fulfill the standard, but are often ineffective.	For educational specialists: • whose professional practice would benefit from additional support; • who receive two or more standards rated as <i>partially effective</i> or one or more standards rated as <i>ineffective</i> on a summative evaluation.
Initiates Process	Evaluator, administrator, or educational specialist	Evaluator*
Documentation	Optional: <i>Support Dialogue Form</i> Memo or other record of the discussion/other forms of documentation at the building/ worksite level	Required: <i>Performance Improvement Plan Form</i> Building/Worksite Level Director/Superintendent is notified
Outcomes	• Sufficient improvement – no more support needed • Some progress – continued support • Little or no progress – educational specialist may be moved to a <i>Performance Improvement Plan</i>	• Sufficient improvement – no longer on <i>Performance Improvement Plan</i> • Some progress – continue on <i>Performance Improvement Plan</i> • Little or no progress – educational specialist may be recommended for dismissal

*The evaluator for educational specialists may be the principal or regional supervisor. If a designee, an assistant principal, for example, has been collecting documentation such as observations, the evaluator and the principal confer about the *Performance Improvement Plan*. The evaluator is responsible for the overall supervision of personnel in the worksite/department/school and as such monitors the *Performance Improvement Plan* and makes the recommendation to the director/superintendent about the employee's progress.

Support Dialogue

The *Support Dialogue* is initiated by evaluators or educational specialists at any point during the school year for use with personnel whose professional practice would benefit from additional support. It is designed to facilitate discussion about the area(s) of concern and ways to address those concerns. During the initial session, both parties share what each will do to support the educational specialist's growth, and decide when to meet again.

After the agreed-upon time to receive support and implement changes in professional practice has elapsed, the evaluator and educational specialist meet again to discuss the impact of the changes. The entire *Support Dialogue* process is intended to be completed within a predetermined time period as it offers targeted support.

It is important to note that the support dialogue process is not intended to be punitive. Educational specialists should feel free to request the targeted support it offers.

The desired outcome would be that the educational specialist's practice has improved to a proficient level. In the event that improvements in performance are still needed, the evaluator makes a determination to either extend the time of the support dialogue because progress has been made, or to allocate additional time or resources. If the necessary improvement is not made, the employee may be placed on a *Performance Improvement Plan*. Sample prompts for conversations with the educational specialist are shown in Figure 16.

Figure 16: *Sample Prompts*

	Sample Prompts for the Initial Conversation What challenges have you encountered in addressing ____ (tell specific concern)? What have you tried to address the concern of ____ (tell specific concern)? What do you need in order to address your concerns?
	Sample Prompts for the Follow-Up Conversation Last time we met, we talked about ____ (tell specific concern). What has gone well? What has not gone as well?

Performance Improvement Plan

If an educational specialist's performance does not meet the expectations established by the school, the educational specialist may be placed on a *Performance Improvement Plan* (see Part III). A *Performance Improvement Plan* is designed to support an educational specialist in addressing areas of concern through targeted supervision and additional resources. It may be used by an evaluator at any point during the year for an educational specialist whose professional practice would benefit from additional support. In addition, an educational specialist will be placed on a *Performance Improvement Plan* if he or she receives the following:

Schools may modify this section to meet their specific policies.

- Two or more performance standards rated as *partially effective* on a *Summative Performance Report*, or
- One or more performance standards rated as *ineffective* on a *Summative Performance Report*.

Implementation of Performance Improvement Plan

When an educational specialist is placed on a *Performance Improvement Plan*, the evaluator must:

- provide written notification to the educational specialist of the area(s) of concern that need(s) to be addressed, and
- formulate a *Performance Improvement Plan* in conjunction with the educational specialist, and
- review the results of the *Performance Improvement Plan* with the educational specialist immediately following the predetermined time period, or according to the specifically established target dates.

Assistance may include:

- support from a professional peer or supervisor, or
- conferences, classes, and workshops on specific topics, and/or
- other resources to be identified.

Resolution of Performance Improvement Plan

Prior to the evaluator making a final recommendation, the evaluator meets with the educational specialist to review progress made on the *Performance Improvement Plan*, according to the timeline. The options for a final recommendation are:

- Sufficient improvement has been achieved; the educational specialist is no longer on a *Performance Improvement Plan* and is rated *effective* on the applicable standard(s) based on all available evidence.
- Partial improvement has been achieved but more improvement is needed; the educational specialist remains on a *Performance Improvement Plan* and is rated *partially effective* on the applicable standard(s) based on all available evidence.
- Little or no improvement has been achieved; the educational specialist is rated *ineffective* on the applicable standard(s) based on all available evidence.

When an educational specialist is rated *ineffective*, the educational specialist may be recommended for dismissal. If not dismissed, a new improvement plan will be implemented. Following completion of the *Performance Improvement Plan*, if the educational specialist is rated *ineffective* a second time, the educational specialist will be recommended for dismissal.

Request for Review of an Ineffective Rating

The educational specialist may request a review of the evidence in relation to an *ineffective* rating received on a summative evaluation, or as a result of a *Performance Improvement Plan*, in accordance with the policies and procedures of the school.

PART II: PERFORMANCE STANDARDS



Educational specialists are evaluated on each performance standard using the performance appraisal rubrics found beneath the listing of performance standards and indicators in this section. The performance indicators are provided as samples of activities that address the standard.

Educational specialists do not need to be in an official educational specialist leader position to be rated as highly effective.

The list of performance indicators is not exhaustive and is not intended to be prescriptive or used as a checklist. Educational specialists may not be expected to demonstrate each performance indicator,

Performance Standard 1: Professional Knowledge

The educational specialist uses professional knowledge to address the needs of the target learning community while demonstrating respect for individual differences, cultures, and learning needs.

Sample Performance Indicators (Examples may include, but are not limited to the following.)

The educational specialist:

- 1.1 Demonstrates knowledge and skills relevant to the profession.
- 1.2 Demonstrates an understanding of the intellectual, social, emotional, and physical development of the learner.
- 1.3 Promotes and models respect for individual and cultural differences.
- 1.4 Uses school, family, and community resources to help meet learner and/or program needs.
- 1.5 Identifies various learning styles and individual needs to assist in the implementation of intervention plans.
- 1.6 Understands one's responsibility to the system and collaborates in order to meet learner needs.

Professional Knowledge Rubric

Highly Effective <i>In addition to meeting the requirements for Effective...</i>	Effective <i>Effective is the expected level of performance.</i>	Partially Effective	Ineffective
The educational specialist uses professional knowledge to lead or engage others to address the needs of the target learning community while demonstrating respect for individual differences of cultures, backgrounds, and learning needs.	The educational specialist uses professional knowledge to address the needs of the target learning community while demonstrating respect for individual differences, cultures, and learning needs.	The educational specialist inconsistently uses professional knowledge to address the needs of the target learning community and/or inconsistently demonstrates respect for individual differences, cultures, and learning needs.	The educational specialist consistently demonstrates a <i>lack of professional knowledge</i> regarding the needs of the target learning community or <i>rarely</i> demonstrates respect for individual differences and understanding of cultures, backgrounds, and learning needs.

Performance Standard 2: Program Planning and Management

The educational specialist plans, coordinates, and manages programs and services consistent with established guidelines, policies, and procedures.

Sample Performance Indicators *(Examples may include, but are not limited to the following.)*

The educational specialist:

- 2.1 Understands and follows applicable regulations, policies, guidelines, and procedures.
- 2.2 Provides a safe and appropriate environment for service delivery.
- 2.3 Organizes and maintains appropriate program and learner records.
- 2.4 Demonstrates proficient scheduling and time management skills.
- 2.5 Identifies and manages available resources (human and financial) to address learner and program needs.
- 2.6 Adheres to proper procedures for using, maintaining, updating, and securing program materials.
- 2.7 Maintains fidelity in delivering programs and services.

Program Planning and Management Rubric

Highly Effective <i>In addition to meeting the requirements for Effective...</i>	Effective <i>Effective is the expected level of performance.</i>	Partially Effective	Ineffective
The educational specialist engages others in the design of plans, and coordinates, and manages programs and services consistent with established guidelines, policies, and procedures. The work impacts the wider learning community.	The educational specialist plans, coordinates, and manages programs and services consistent with established guidelines, policies, and procedures.	The educational specialist attempts, but <i>inconsistently</i> plans, coordinates, and manages programs and services consistent with established guidelines, policies, and procedures.	The educational specialist <i>rarely</i> plans, coordinates, and manages programs and services consistent with established guidelines, policies, and procedures.

Performance Standard 3: Program Delivery

The educational specialist uses professional knowledge to implement a variety of services for the targeted learning community.

Sample Performance Indicators (Examples may include, but are not limited to the following.)

The educational specialist:

- 3.1 Selects, develops, organizes, implements, and supports curriculum for specific learner and/or program needs.
- 3.2 Uses technology, materials, and other resources as appropriate to deliver services and programs.
- 3.3 Presents information and provides services using a variety of strategies or approaches to meet the needs of the learning community.
- 3.4 Collaborates with instructional staff to design, implement, or support services for specific learner or program needs.
- 3.5 On a continual basis, consults with administration, parents, community agencies, school, and support personnel to resolve issues and/or communicate progress related to the provision of programs/services to individual learners.
- 3.6 Provides services that will support mastery of applicable standards.
- 3.7 Interprets policies, programs, and procedures related to the delivery of services to learners.

Program Delivery Rubric

Highly Effective <i>In addition to meeting the requirements for Effective...</i>	Effective <i>Effective is the expected level of performance.</i>	Partially Effective	Ineffective
The educational specialist uses professional knowledge in an innovative manner to provide a variety of exceptional services for the targeted learning community.	The educational specialist uses professional knowledge to implement a variety of services for the targeted learning community.	The educational specialist attempts to use professional knowledge to implement services, but efforts are <i>inconsistent</i> in addressing the needs of the targeted learning community.	The educational specialist <i>rarely</i> uses professional knowledge to implement services to meet the needs of the targeted learning community.

Performance Standard 4: Assessment

The educational specialist gathers, analyzes, and uses data to determine learner/program needs, measure learner/program progress, guide instruction and intervention, and provide timely feedback to learners, families, staff, and community.

Sample Performance Indicators *(Examples may include, but are not limited to the following.)*

The educational specialist:

- 4.1 Demonstrates proficiency in administering, scoring, evaluating, and interpreting data from instruments or records.
- 4.2 Provides accurate feedback to learners, families, and staff on assessment results.
- 4.3 Uses assessment information in making recommendations or decisions that are in the best interest of the learner/school.
- 4.4 Uses assessment data to modify strategies, interventions, services, and programs.
- 4.5 Uses data to assess learner and/or program needs.
- 4.6 Uses data to assess learner and/or program outcomes.
- 4.7 Documents learner and/or program outcomes.

Assessment Rubric

Highly Effective <i>In addition to meeting the requirements for Effective...</i>	Effective <i>Effective is the expected level of performance.</i>	Partially Effective	Ineffective
The educational specialist <i>consistently demonstrates a high level of performance</i> and takes a leadership role in gathering, analyzing and using data to guide instructional and program planning, and provides timely feedback to learners, families, staff, and the community.	The educational specialist gathers, analyzes, and uses data to determine learner/program needs, measure learner/program progress, guide instruction and intervention, and provide timely feedback to learners, families, staff, and the community.	The educational specialist attempts, but is <i>inconsistent</i> in gathering, analyzing, and using data, and/or providing timely feedback to learners, families, staff, and the community.	The educational specialist <i>rarely</i> uses data to measure learner progress, implement program planning, guide instruction, or to provide timely feedback to learners, families, staff, and the community.

Performance Standard 5: Communication and Collaboration

The educational specialist communicates and collaborates appropriately with learners, families, staff, and the community to promote student learning and well-being.

Sample Performance Indicators (*Examples may include, but are not limited to the following.*)

The educational specialist:

- 5.1 Supports, promotes, and communicates the mission, vision, and goals of the school.
- 5.2 Demonstrates appropriate written, verbal, and nonverbal communication skills.
- 5.3 Initiates, maintains, and appropriately documents communication to support the needs and progress of the learning community.
- 5.4 Supports learner success and well-being by working collaboratively with stakeholders.
- 5.5 Collaborates with stakeholders to design, implement, and/or support services for specific learner or program needs.
- 5.6 Responds promptly to learner, family, staff, and community concerns.
- 5.7 Actively assumes an advocacy role for learners and families.
- 5.8 Uses resources, including technology, to efficiently communicate with stakeholders.

Communication and Collaboration Rubric

Highly Effective <i>In addition to meeting the requirements for Effective...</i>	Effective <i>Effective is the expected level of performance.</i>	Partially Effective	Ineffective
The educational specialist demonstrates initiative in enhancing effective communication and collaboration techniques between the learners, families, staff, and the community.	The educational specialist communicates and collaborates appropriately with learners, families, staff, and the community to promote student learning and well-being.	The educational specialist attempts, but is <i>inconsistent</i> in communicating and has difficulty collaborating with learners, families, staff, and the community.	The educational specialist <i>rarely</i> communicates and collaborates appropriately with learners, families, staff, and the community.

Performance Standard 6: Professionalism

The educational specialist demonstrates behavior consistent with legal, ethical, and professional standards, contributes to the profession, and engages in professional growth.

Sample Performance Indicators (*Examples may include, but are not limited to the following.*)

The educational specialist:

- 6.1 Follows applicable guidelines and school policies and procedures.
- 6.2 Maintains positive professional behavior (e.g., appearance, demeanor, punctuality, and attendance).
- 6.3 Performs assigned duties in a timely manner.
- 6.4 Respects and maintains confidentiality.
- 6.5 Evaluates and identifies strengths and areas for growth related to professional skills.
- 6.6 Sets measurable goals for improvement of skills and professional performance.
- 6.7 Participates in professional growth activities and incorporates learning into professional practices.
- 6.8 Contributes to the organization and community.
- 6.9 Adheres to professional, legal, and ethical standards.

Professionalism Rubric

Highly Effective <i>In addition to meeting the requirements for Effective...</i>	Effective <i>Effective is the expected level of performance.</i>	Partially Effective	Ineffective
The educational specialist is a professional role model for others, engages in a high level of personal professional growth, and/or contributes to the development of others and the well-being of the profession.	The educational specialist exhibits behavior consistent with legal, ethical, and professional standards, contributes to the profession, and engages in professional growth.	The educational specialist demonstrates limited understanding of professional ethics, inconsistently participates in professional growth opportunities or inconsistently applies learning from professional development in a way that contributes to the profession.	The educational specialist <i>exhibits unethical behavior, rarely</i> participates in professional growth opportunities or <i>rarely</i> applies learning from professional development in a way that contributes to the profession.

Performance Standard 7 (Optional): Learner/Program Progress

The work of the educational specialist results in acceptable and measurable learner or program progress based on established standards and/or school goals.

Sample Performance Indicators *(Examples may include, but are not limited to the following.)*

The educational specialist:

- 7.1 Sets measurable, reasonable, and appropriate goals for learner/program progress.
- 7.2 Assesses prerequisite developmental knowledge and skills to determine initial level of service delivery.
- 7.3 Monitors learner/program progress through the use of appropriate assessments.
- 7.4 Identifies and establishes additional means of support to increase learner/program progress.
- 7.5 Provides evidence that learner/programs are meeting measurable, reasonable, and appropriate outcomes.

Learner/Program Progress Rubric

Highly Effective <i>In addition to meeting the requirements for Effective...</i>	Effective <i>Effective is the expected level of performance.</i>	Partially Effective	Ineffective
The work of the educational specialist results in <i>a high level</i> of learner progress with all populations and/or program progress.	The work of the educational specialist results in acceptable and measurable learner or program progress based on established standards and/or school goals.	The instructional efforts of the educational specialist result in <i>inconsistent</i> learner/program progress; more progress is needed to meet established standards.	The work of the educational specialist <i>rarely</i> results in acceptable learner progress and/or program progress.

PART III: FORMS AND LOGS

INTRODUCTION

Part III contains copies of forms supporting the evaluation of educational specialists. The evaluator and the educational specialist use the forms to provide evidence of the quality of work performed. The evaluator maintains the forms and provides copies to the educational specialist. At a minimum, the evaluator retains copies of the completed *Student Learning/Program Objective Progress Form*, *Documentation Log Cover Sheet* (if used), *Observation or Feedback Forms*, *Summative Performance Report*, and *Performance Improvement Plan* (if needed).

Schools may modify these forms to meet their needs.

Figure 17: Forms and Logs

Area	Form	Documentation Completed by	
		Evaluator	Educational Specialist
Self-Reflection	Self-Assessment Form		✓
Observation/ Formative Feedback	Pre-Observation Conference Record	✓	
	Formative Feedback Form 1	✓	
	Formative Feedback Form 2	✓	
Documentation Log	Documentation Log Cover Sheet		✓
	Communication Log		✓
	Professional Development Log		✓
Surveys	Client Surveys Grade K-2 Learner Survey Grade 3-5 Learner Survey Grade 6-8 Learner Survey Grade 9-12 Learner Survey Adult Client Survey Family Survey		
	Client Survey Summary		✓
Student Growth	Student Learning/Program Objective Progress Form	✓	✓
Evaluation	Summative Performance Report	✓	
Improvement	Support Dialogue Form	✓	✓
	Performance Improvement Plan Form	✓	✓

Self-Assessment Form

Directions: *This is an optional form that educational specialists may use to do a self-assessment of their performance related to each standard. The indicators are examples of what successful performance of that standard may entail, but they should not be viewed as a checklist of behaviors.*

Date: _____

1. Professional Knowledge

The educational specialist uses professional knowledge to address the needs of the target learning community while demonstrating respect for individual differences, cultures, and learning needs.

- | | |
|--|--|
| 1.1 Demonstrates knowledge and skills relevant to the profession. | 1.4 Uses school, family, and community resources to help meet learner and/or program needs. |
| 1.2 Demonstrates an understanding of the intellectual, social, emotional, and physical development of the learner. | 1.5 Identifies various learning styles and individual needs to assist in the implementation of intervention plans. |
| 1.3 Promotes and models respect for individual and cultural differences. | 1.6 Understands one's responsibility to the system and collaborates in order to meet learner needs. |

Strengths:

Areas for Growth:

2. Program Planning and Management

The educational specialist plans, coordinates, and manages programs and services consistent with established guidelines, policies, and procedures.

- | | |
|---|--|
| 2.1 Understands and follows applicable regulations, policies, guidelines, and procedures. | 2.5 Identifies and manages available resources (human and financial) to address learner and program needs. |
| 2.2 Provides a safe and appropriate environment for service delivery. | 2.6 Adheres to proper procedures for using, maintaining, updating, and securing program materials. |
| 2.3 Organizes and maintains appropriate program and learner records. | 2.7 Maintains fidelity in delivering programs and services. |
| 2.4 Demonstrates proficient scheduling and time management skills. | |

Strengths:

Areas for Growth:

3. Program Delivery

The educational specialist uses professional knowledge to implement a variety of services for the targeted learning community.

- | | |
|---|--|
| 3.1 Selects, develops, organizes, implements, and supports curriculum for specific learner and/or program needs. | 3.5 On a continual basis, consults with administration, parents, community agencies, school, and support personnel to resolve issues and/or communicate progress related to the provision of programs/services to individual learners. |
| 3.2 Uses technology, materials, and other resources as appropriate to deliver services and programs. | 3.6 Provides services that will support mastery of applicable standards. |
| 3.3 Presents information and provides services using a variety of strategies or approaches to meet the needs of the learning community. | 3.7 Interprets policies, programs, and procedures related to the delivery of services to learners. |
| 3.4 Collaborates with instructional staff to design, implement, or support services for specific learner or program needs. | |

Strengths:

Areas for Growth:

4. Assessment

The educational specialist gathers, analyzes, and uses data to determine learner/program needs, measure learner/program progress, guide instruction and intervention, and provide timely feedback to learners, families, staff, and community.

- | | |
|---|---|
| 4.1 Demonstrates proficiency in administering, scoring, evaluating, and interpreting data from instruments or records. | 4.4 Uses assessment data to modify strategies, interventions, services, and programs. |
| 4.2 Provides accurate feedback to learners, families, and staff on assessment results. | 4.5 Uses data to assess learner and/or program needs. |
| 4.3 Uses assessment information in making recommendations or decisions that are in the best interest of the learner/school. | 4.6 Uses data to assess learner and/or program outcomes. |
| | 4.7 Documents learner and/or program outcomes. |

Strengths:

Areas for Growth:

5. Communication and Collaboration

The educational specialist communicates and collaborates appropriately with learners, families, staff, and the community to promote student learning and well-being.

- | | |
|--|---|
| 5.1 Supports, promotes, and communicates the mission, vision, and goals of the school. | 5.5 Collaborates with stakeholders to design, implement, and/or support services for specific learner or program needs. |
| 5.2 Demonstrates appropriate written, verbal, and nonverbal communication skills. | 5.6 Responds promptly to learner, family, staff, and community concerns. |
| 5.3 Initiates, maintains, and appropriately documents communication to support the needs and progress of the learning community. | 5.7 Actively assumes an advocacy role for learners and families. |
| 5.4 Supports learner success and well-being by working collaboratively with stakeholders. | 5.8 Uses resources, including technology, to efficiently communicate with stakeholders. |

Strengths:

Areas for Growth:

6. Professionalism

The educational specialist demonstrates behavior consistent with legal, ethical, and professional standards, contributes to the profession, and engages in professional growth.

- | | |
|---|---|
| 6.1 Follows applicable guidelines and school policies and procedures. | 6.6 Sets measurable goals for improvement of skills and professional performance. |
| 6.2 Maintains positive professional behavior (e.g., appearance, demeanor, punctuality, and attendance). | 6.7 Participates in professional growth activities and incorporates learning into professional practices. |
| 6.3 Performs assigned duties in a timely manner. | 6.8 Contributes to the organization and community. |
| 6.4 Respects and maintains confidentiality. | 6.9 Adheres to professional, legal, and ethical standards. |
| 6.5 Evaluates and identifies strengths and areas for growth related to professional skills. | |

Strengths:

Areas for Growth:

7. Learner/Program Progress

The work of the educational specialist results in acceptable and measurable learner or program progress based on established standards and/or school goals.

- | | |
|--|---|
| 7.1 Sets measurable, reasonable, and appropriate goals for learner/program progress. | 7.4 Identifies and establishes additional means of support to increase learner/program progress. |
| 7.2 Assesses prerequisite developmental knowledge and skills to determine initial level of service delivery. | 7.5 Provides evidence that learner/programs are meeting measurable, reasonable, and appropriate outcomes. |
| 7.3 Monitors learner/program progress through the use of appropriate assessments. | |

Strengths:

Areas for Growth:

Comments:

Pre-Observation Conference Record

Educational Specialist: _____ Grade/Subject: _____

Observer: _____ Date: _____

Inquiries	Notes
1. Describe the goal for the client(s). What have/will you have done instructionally with the client(s) in the days prior to the observation?	
2. Describe the client(s).	
3. What will be observed?	
4. What methods will be used to achieve the goal?	
5. Where should I focus the observation?	
6. Is there anything else you would like me to know?	

The following several pages include two different forms that may be used for observations. Schools may choose to use one or both of these based on their needs. Schools may also use a different observation form of their choosing.

Formative Feedback Form 1

Directions: Evaluators should use this form to provide feedback to educational specialists about the evidence they have collected through observation, a review of educational specialist artifacts, or via other means.

Educational Specialist: _____ Grade/Subject: _____

Evaluator: _____ Date/Time: _____

1. Professional Knowledge

The educational specialist uses professional knowledge to address the needs of the target learning community while demonstrating respect for individual differences, cultures, and learning needs.

- 1.1 Demonstrates knowledge and skills relevant to the profession.
- 1.2 Demonstrates an understanding of the intellectual, social, emotional, and physical development of the learner.
- 1.3 Promotes and models respect for individual and cultural differences.
- 1.4 Uses school, family, and community resources to help meet learner and/or program needs.
- 1.5 Identifies various learning styles and individual needs to assist in the implementation of intervention plans.
- 1.6 Understands one's responsibility to the system and collaborates in order to meet learner needs.

Evidence:

Observation ☐ Artifacts ☐ Other ☐

2. Program Planning and Management

The educational specialist plans, coordinates, and manages programs and services consistent with established guidelines, policies, and procedures.

- 2.1 Understands and follows applicable regulations, policies, guidelines, and procedures.
- 2.2 Provides a safe and appropriate environment for service delivery.
- 2.3 Organizes and maintains appropriate program and learner records.
- 2.4 Demonstrates proficient scheduling and time management skills.
- 2.5 Identifies and manages available resources (human and financial) to address learner and program needs.
- 2.6 Adheres to proper procedures for using, maintaining, updating, and securing program materials.
- 2.7 Maintains fidelity in delivering programs and services.

Evidence:

Observation ☐ Artifacts ☐ Other ☐

3. Program Delivery

The educational specialist uses professional knowledge to implement a variety of services for the targeted learning community.

- 3.1 Selects, develops, organizes, implements, and supports curriculum for specific learner and/or program needs.
- 3.2 Uses technology, materials, and other resources as appropriate to deliver services and programs.
- 3.3 Presents information and provides services using a variety of strategies or approaches to meet the needs of the learning community.
- 3.4 Collaborates with instructional staff to design, implement, or support services for specific learner or program needs.
- 3.5 On a continual basis, consults with administration, parents, community agencies, school, and support personnel to resolve issues and/or communicate progress related to the provision of programs/services to individual learners.
- 3.6 Provides services that will support mastery of applicable standards.
- 3.7 Interprets policies, programs, and procedures related to the delivery of services to learners.

Evidence:

Observation ☐ Artifacts ☐ Other ☐

4. Assessment

The educational specialist gathers, analyzes, and uses data to determine learner/program needs, measure learner/program progress, guide instruction and intervention, and provide timely feedback to learners, families, staff, and community.

- 4.1 Demonstrates proficiency in administering, scoring, evaluating, and interpreting data from instruments or records.
- 4.2 Provides accurate feedback to learners, families, and staff on assessment results.
- 4.3 Uses assessment information in making recommendations or decisions that are in the best interest of the learner/school.
- 4.4 Uses assessment data to modify strategies, interventions, services, and programs.
- 4.5 Uses data to assess learner and/or program needs.
- 4.6 Uses data to assess learner and/or program outcomes.
- 4.7 Documents learner and/or program outcomes.

Evidence:

Observation ☐ Artifacts ☐ Other ☐

5. Communication and Collaboration

The educational specialist communicates and collaborates appropriately with learners, families, staff, and the community to promote student learning and well-being.

- 5.1 Supports, promotes, and communicates the mission, vision, and goals of the school.
- 5.2 Demonstrates appropriate written, verbal, and nonverbal communication skills.
- 5.3 Initiates, maintains, and appropriately documents communication to support the needs and progress of the learning community.
- 5.4 Supports learner success and well-being by working collaboratively with stakeholders.
- 5.5 Collaborates with stakeholders to design, implement, and/or support services for specific learner or program needs.
- 5.6 Responds promptly to learner, family, staff, and community concerns.
- 5.7 Actively assumes an advocacy role for learners and families.
- 5.8 Uses resources, including technology, to efficiently communicate with stakeholders.

Evidence:

Observation ☐ Artifacts ☐ Other ☐

6. Professionalism

The educational specialist demonstrates behavior consistent with legal, ethical, and professional standards, contributes to the profession, and engages in professional growth.

- 6.1 Follows applicable guidelines and school policies and procedures.
- 6.2 Maintains positive professional behavior (e.g., appearance, demeanor, punctuality, and attendance).
- 6.3 Performs assigned duties in a timely manner.
- 6.4 Respects and maintains confidentiality.
- 6.5 Evaluates and identifies strengths and areas for growth related to professional skills.
- 6.6 Sets measurable goals for improvement of skills and professional performance.
- 6.7 Participates in professional growth activities and incorporates learning into professional practices.
- 6.8 Contributes to the organization and community.
- 6.9 Adheres to professional, legal, and ethical standards.

Evidence:

Observation ☐ Artifacts ☐ Other ☐

7. Learner/Program Progress

The work of the educational specialist results in acceptable and measurable learner or program progress based on established standards and/or school goals.

- 7.1 Sets measurable, reasonable, and appropriate goals for learner/program progress.
- 7.2 Assesses prerequisite developmental knowledge and skills to determine initial level of service delivery.
- 7.3 Monitors learner/program progress through the use of appropriate assessments.
- 7.4 Identifies and establishes additional means of support to increase learner/program progress.
- 7.5 Provides evidence that learner/programs are meeting measurable, reasonable, and appropriate outcomes.

Evidence:

Observation ☐ Artifacts ☐ Other ☐

Additional Comments:

Educational Specialist's Signature: _____ Date: _____

Evaluator's Signature: _____ Date: _____

Formative Feedback Form 2

Directions: Evaluators use this form to provide formative feedback to educational specialists based on observation or other relevant sources. Once completed, this form will be submitted to the educational specialist.

NOTE: This form is not to be used as a checklist. It is not expected that each indicator would be observed or otherwise documented on this form during a single observation or documentation period.

- Evidence may be positive and/or negative examples/omissions.
- Evidence may be documented in the general evidence box under each performance standard or next to the applicable indicator.
- If the evaluator checks *Evident Area of Strength* or *Evident Area of Weakness*, he/she must enter evidence related to that indicator; however, evidence for an indicator may be listed without annotating it as an area of strength or weakness.
- As formative feedback, documenting an indicator as an *Evident Area of Strength* or *Evident Area of Weakness* will not necessarily equate to a particular summative rating in that performance standard. Rather, summative ratings are based on a preponderance of evidence collected over the entire evaluation cycle.

Educational Specialist: _____ Grade/Subject: _____

Evaluator: _____ Date/Time: _____

This form documents evidence from the following sources:

- | | |
|--------------------------------------|--------------------------------------|
| ☐ Observation | ☐ Artifacts |
| ☐ Conferences | ☐ Other _____ |

Standard 1: Professional Knowledge

The educational specialist uses professional knowledge to address the needs of the target learning community while demonstrating respect for individual differences, cultures, and learning needs.

Standard 1 Evidence:

Standard 1 Indicators	Evident Area of Strength <i>Check if applicable</i>	Evident Area of Weakness <i>Check if applicable</i>
1.1 Demonstrates knowledge and skills relevant to the profession.		
Evidence:		
1.2 Demonstrates an understanding of the intellectual, social, emotional, and physical development of the learner.		
Evidence:		
1.3 Promotes and models respect for individual and cultural differences.		
Evidence:		
1.4 Uses school, family, and community resources to help meet learner and/or program needs.		
Evidence:		
1.5 Identifies various learning styles and individual needs to assist in the implementation of intervention plans.		
Evidence:		
1.6 Understands one's responsibility to the system and collaborates in order to meet learner needs.		
Evidence:		
Other:		
Evidence:		

Standard 2. Program Planning and Management

The educational specialist plans, coordinates, and manages programs and services consistent with established guidelines, policies, and procedures.

Standard 2 Evidence:

Standard 2 Indicators	Evident Area of Strength <i>Check if applicable</i>	Evident Area of Weakness <i>Check if applicable</i>
2.1 Understands and follows applicable regulations, policies, guidelines, and procedures.		
Evidence:		
2.2 Provides a safe and appropriate environment for service delivery.		
Evidence:		
2.3 Organizes and maintains appropriate program and learner records.		
Evidence:		
2.4 Demonstrates proficient scheduling and time management skills.		
Evidence:		
2.5 Identifies and manages available resources (human and financial) to address learner and program needs.		
Evidence:		
2.6 Adheres to proper procedures for using, maintaining, updating, and securing program materials.		
Evidence:		
2.7 Maintains fidelity in delivering programs and services.		
Evidence:		
Other:		
Evidence:		

Standard 3. Program Delivery

The educational specialist uses professional knowledge to implement a variety of services for the targeted learning community.

Standard 3 Evidence:

Standard 3 Indicators	Evident Area of Strength <i>Check if applicable</i>	Evident Area of Weakness <i>Check if applicable</i>
3.1 Selects, develops, organizes, implements, and supports curriculum for specific learner and/or program needs.		
Evidence:		
3.2 Uses technology, materials, and other resources as appropriate to deliver services and programs.		
Evidence:		
3.3 Presents information and provides services using a variety of strategies or approaches to meet the needs of the learning community.		
Evidence:		
3.4 Collaborates with instructional staff to design, implement, or support services for specific learner or program needs.		
Evidence:		
3.5 On a continual basis, consults with administration, parents, community agencies, school, and support personnel to resolve issues and/or communicate progress related to the provision of programs/services to individual learners.		
Evidence:		
3.6 Provides services that will support mastery of applicable standards.		
Evidence:		
3.7 Interprets policies, programs, and procedures related to the delivery of services to learners.		
Evidence:		

Standard 3 Indicators (cont.)	Evident Area of Strength <i>Check if applicable</i>	Evident Area of Weakness <i>Check if applicable</i>
Other:		
<i>Evidence:</i>		
Standard 4. Assessment <i>The educational specialist gathers, analyzes, and uses data to determine learner/program needs, measure learner/program progress, guide instruction and intervention, and provide timely feedback to learners, families, staff, and community.</i> Standard 4 Evidence:		
Standard 4 Indicators	Evident Area of Strength <i>Check if applicable</i>	Evident Area of Weakness <i>Check if applicable</i>
4.1 Demonstrates proficiency in administering, scoring, evaluating, and interpreting data from instruments or records.		
<i>Evidence:</i>		
4.2 Provides accurate feedback to learners, families, and staff on assessment results.		
<i>Evidence:</i>		
4.3 Uses assessment information in making recommendations or decisions that are in the best interest of the learner/school.		
<i>Evidence:</i>		
4.4 Uses assessment data to modify strategies, interventions, services, and programs.		
<i>Evidence:</i>		
4.5 Uses data to assess learner and/or program needs.		
<i>Evidence:</i>		
4.6 Uses data to assess learner and/or program outcomes.		
<i>Evidence:</i>		

Standard 4 Indicators (cont.)	Evident Area of Strength <i>Check if applicable</i>	Evident Area of Weakness <i>Check if applicable</i>
4.7 Documents learner and/or program outcomes.		
Evidence:		
Other:		
Evidence:		
Standard 5. Communication and Collaboration <i>The educational specialist communicates and collaborates appropriately with learners, families, staff, and the community to promote student learning and well-being.</i> Standard 5 Evidence:		
Standard 5 Indicators	Evident Area of Strength <i>Check if applicable</i>	Evident Area of Weakness <i>Check if applicable</i>
5.1 Supports, promotes, and communicates the mission, vision, and goals of the school.		
Evidence:		
5.2 Demonstrates appropriate written, verbal, and nonverbal communication skills.		
Evidence:		
5.3 Initiates, maintains, and appropriately documents communication to support the needs and progress of the learning community.		
Evidence:		
5.4 Supports learner success and well-being by working collaboratively with stakeholders.		
Evidence:		
5.5 Collaborates with stakeholders to design, implement, and/or support services for specific learner or program needs.		
Evidence:		

Standard 5 Indicators (cont.)	Evident Area of Strength <i>Check if applicable</i>	Evident Area of Weakness <i>Check if applicable</i>
5.6 Responds promptly to learner, family, staff, and community concerns.		
Evidence:		
5.7 Actively assumes an advocacy role for learners and families.		
Evidence:		
5.8 Uses resources, including technology, to efficiently communicate with stakeholders.		
Evidence:		
Other:		
Evidence:		
Standard 6: Professionalism <i>The educational specialist demonstrates behavior consistent with legal, ethical, and professional standards, contributes to the profession, and engages in professional growth.</i> Standard 6 Evidence:		
Standard 6 Indicators	Evident Area of Strength <i>Check if applicable</i>	Evident Area of Weakness <i>Check if applicable</i>
6.1 Follows applicable guidelines and school policies and procedures.		
Evidence:		
6.2 Maintains positive professional behavior (e.g., appearance, demeanor, punctuality, and attendance).		
Evidence:		
6.3 Performs assigned duties in a timely manner.		
Evidence:		

Standard 6 Indicators (cont.)	Evident Area of Strength <i>Check if applicable</i>	Evident Area of Weakness <i>Check if applicable</i>
6.4 Respects and maintains confidentiality.		
Evidence:		
6.5 Evaluates and identifies strengths and areas for growth related to professional skills.		
Evidence:		
6.6 Sets measurable goals for improvement of skills and professional performance.		
Evidence:		
6.7 Participates in professional growth activities and incorporates learning into professional practices.		
Evidence:		
6.8 Contributes to the organization and community.		
Evidence:		
6.9 Adheres to professional, legal, and ethical standards.		
Evidence:		
Other:		
Evidence:		
Standard 7. Learner/Program Progress <i>The work of the educational specialist results in acceptable and measurable learner or program progress based on established standards and/or school goals</i> Standard 7 Evidence:		

Standard 7 Indicators	Evident Area of Strength <i>Check if applicable</i>	Evident Area of Weakness <i>Check if applicable</i>
7.1 Sets measurable, reasonable, and appropriate goals for learner/program progress.		
Evidence:		
7.2 Assesses prerequisite developmental knowledge and skills to determine initial level of service delivery.		
Evidence:		
7.3 Monitors learner/program progress through the use of appropriate assessments.		
Evidence:		
7.4 Identifies and establishes additional means of support to increase learner/program progress.		
Evidence:		
7.5 Provides evidence that learner/programs are meeting measurable, reasonable, and appropriate outcomes.		
Evidence:		
Other:		
Evidence:		

Comments:

Educational Specialist's Signature: _____ Date: _____

Evaluator's Signature: _____ Date: _____

This cover sheet is optional if artifacts are uploaded electronically.

Documentation Log Cover Sheet

Directions: In addition to the required items specified by the school, educational specialists should include other artifacts of their choosing that show evidence that they are meeting the standards.

Educational Specialist: _____ School Year: _____

Perf. Stnd.	Examples of Evidence	Evidence Included
Professional Knowledge	• Transcripts of coursework • Annotated Professional Development certificates • Annotated list of instructional activities • Lesson/intervention plan • Journals/notes that represent reflective thinking and professional growth • Samples of innovative approaches developed by educational specialist • Behavior plans	
Program Planning and Management	• Differentiation in lesson planning and practice • Analysis of learner or classroom assessment • Data from the circulation system for planning for program management • Data-driven curriculum revision work, such as: - Sample lesson, unit or treatment plan - Course syllabus - Intervention plan - Substitute lesson plan - Annotated learning objectives - Schedule ESEPEs Requirement: Evidence of using data about student learning to guide planning and instruction	
Program Delivery	• Educational specialist-specific resources based on the needs of the community - Reading Specialist: list of interventions - Nurse: medical community links - Media Specialist: technology available - Social Worker: Record of home visits - Instructional Coach: record of interventions throughout school ESEPEs Requirement: Service or Program Log	

Perf. Stnd.	Examples of Evidence	Evidence Included
Assessment	• Samples of baseline and periodic assessments and analysis • Progress reports • Summary of assessment procedures • Notifications made on a modified intervention and/or program based on feedback • Graphs or tables of student results • Records within electronic curriculum mapping tool • Brief report describing your record keeping system and how it is used to monitor student progress • Copy of scoring rubrics • Photographs or photocopies of student work with written comments • Samples of educational reports, progress reports or letters prepared for parents or students • Copy of disaggregated analysis of student achievement scores on standardized test • Copy of learner' journals of self-reflection and self-monitoring ESEPEs Requirement: Data demonstrating program and/or intervention effectiveness	
Communication and Collaboration	• Examples of collaborative work with peers • Other evidence of communication with learners, families, colleagues and community ESEPEs Requirement: Communication Log	
Professionalism	• Record of professional development taken or given • Client survey summary information ESEPEs Requirement: Evidence of commitment to professional growth; client survey summary information	
Learner/Program Progress	ESEPEs Requirement: Student Learning Objective document – Revised at midterm and end of year	

Communication Log

Educational Specialist: _____ School Year: _____

Date	Person	Purpose	Mode	Notes
			☐ Conference ☐ Email ☐ Note/Letter ☐ Telephone	
			☐ Conference ☐ Email ☐ Note/Letter ☐ Telephone	
			☐ Conference ☐ Email ☐ Note/Letter ☐ Telephone	
			☐ Conference ☐ Email ☐ Note/Letter ☐ Telephone	
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			☐ Conference ☐ Email ☐ Note/Letter ☐ Telephone	

Professional Development Log

Educational Specialist: _____ School Year: _____

Professional Development Activity	Date	Location	Evidence of Satisfactory Completion Received
			☐ Grade ☐ Certificate ☐ Other _____
			☐ Grade ☐ Certificate ☐ Other _____
			☐ Grade ☐ Certificate ☐ Other _____
			☐ Grade ☐ Certificate ☐ Other _____
			☐ Grade ☐ Certificate ☐ Other _____
			☐ Grade ☐ Certificate ☐ Other _____
			☐ Grade ☐ Certificate ☐ Other _____
			☐ Grade ☐ Certificate ☐ Other _____
			☐ Grade ☐ Certificate ☐ Other _____
			☐ Grade ☐ Certificate ☐ Other _____
			☐ Grade ☐ Certificate ☐ Other _____

Grade K-2 Learner Survey

Directions: As your educational specialist reads the sentence, color the face that shows what you think.

Educational Specialist: _____ Date: _____

	Yes	Sometimes	No
1. I get help when I need it.			
2. I learn new things in my class.			
3. I know what the rules are in my class.			
4. I am able to do the work.			
5. I am happy when I am in class.			
6. I can ask questions in class.			
7. My specialist cares about me.			
*			

*Add other elements if needed, such as school-wide goals, or subject-specific elements.

Grade 3-5 Learner Survey

Directions: DO NOT PUT YOUR NAME ON THIS SURVEY: Follow along as your educational specialist reads the statements. Respond to the statements by placing a checkmark (✓) beneath the response – “YES,” “SOMETIMES,” or “NO” – that best describes how you feel about the statement.

Educational Specialist: _____ Date: _____

	Yes	Sometimes	No
1. My specialist listens to me.			
2. My specialist gives me help when I need it.			
3. My specialist gives me work I am able to complete.			
4. My specialist ensures that people are respectful in class.			
5. My specialist answers my questions.			
6. My specialist helps me understand things when I make mistakes.			
7. My specialist shows respect to all learners.			
8. My specialist helps me to be organized.			
9. My specialist allows me to demonstrate my learning in a variety of ways.			
10. My specialist cares about me.			
*			

*Add other elements if needed, such as school-wide goals, or subject-specific elements.

Grade 6-8 Learner Survey

The purpose of this survey is to allow you to give your educational specialist ideas about how to improve services.

Directions: *DO NOT PUT YOUR NAME ON THIS SURVEY. Write your educational specialist's name, date, and class/period in the space provided. Listed below are several statements about the specialist. Indicate your agreement with each statement by placing a check (✓) in the appropriate box. If you wish to comment, please write your comments at the end of the survey.*

Educational Specialist: _____ Date: _____ Class/Period: _____

	Strongly Agree	Agree	Disagree	Strongly Disagree	Not Applicable
1. My specialist gives clear instructions.					
2. My specialist helps me to be organized.					
3. My specialist sets high learning standards.					
4. My specialist allows me to demonstrate my learning and abilities in a variety of ways.					
5. My specialist helps me outside of class time when needed.					
6. My specialist provides a safe, positive learning environment.					
7. My specialist shows respect to all learners.					
8. My specialist is respectful to my culture.					
9. My specialist values me as a person.					
10. My specialist helps me to feel comfortable sharing my ideas.					
*					
*					

*Add other elements if needed, such as school-wide goals, or subject-specific elements.

Grade 9-12 Learner Survey

The purpose of this survey is to allow you to give your educational specialist ideas about how to improve services.

Directions: *DO NOT PUT YOUR NAME ON THIS SURVEY. Write your educational specialist's name, date, and class period in the space provided. Listed below are several statements about the specialist. Indicate your agreement with each statement by placing a check (✓) in the appropriate box. If you wish to comment, please write your comments at the end of the survey.*

Educational Specialist: _____ Date: _____ Class/Period: _____

	Strongly Agree	Agree	Disagree	Strongly Disagree	Not Applicable
1. My specialist communicates clearly.					
2. My specialist gives helpful feedback.					
3. My specialist provides a safe, positive learning environment.					
4. My specialist allows me to demonstrate my learning and abilities in a variety of ways.					
5. My specialist challenges me.					
6. My specialist makes me feel comfortable sharing my ideas.					
7. My specialist helps me outside of class time when needed.					
8. My specialist shows respect to all learners.					
9. My specialist respects my culture.					
10. My specialist values me as a person.					
11. My specialist provides me with the tools for me to help myself.					
*					
*					

*Add other elements if needed, such as school-wide goals, or subject-specific elements.

Comments:

Adult Client Survey

The purpose of this survey is to give the educational specialist feedback.

Directions: DO NOT PUT YOUR NAME ON THIS SURVEY. Listed below are several statements regarding the educational specialist. Mark the most appropriate response to each statement. Please write any comments in the space provided. You may attach additional sheets.

Educational Specialist: _____ School Year: _____

Position: _____ School: _____

	Strongly Agree	Agree	Disagree	Strongly Disagree	Not Applicable
1. The educational specialist provides feedback in a reasonable amount of time.					
2. The educational specialist is accessible to me.					
3. The educational specialist responds to emergency situations.					
4. The educational specialist asks for information about the learner/situation from me to aid in decision making.					
5. The educational specialist shares methods with me to facilitate learner progress.					
6. The educational specialist advocates for the learner.					
7. The educational specialist is respectful of others.					
8. The educational specialist promotes open communication.					
9. The educational specialist demonstrates knowledge of job related laws and mandates.					
10. The educational specialist is knowledgeable of content standards.					
11. The educational specialist demonstrates an understanding of the learning community.					
12. The educational specialist is committed to improving the school.					
*					

*Add other elements if needed, such as school-wide goals, or subject specific-elements.

I am a(n) ☐ Teacher ☐ Staff member ☐ Administrator ☐ Other

Additional Comments:

Family Survey

The purpose of this survey is to give the educational specialist feedback.

Directions: *DO NOT PUT YOUR NAME ON THIS SURVEY. Listed below are several statements regarding the educational specialist. Mark the most appropriate response to each statement. Please write any comments in the space provided. You may attach additional sheets.*

Educational Specialist: _____ School Year: _____

Position: _____ School: _____

	Strongly Agree	Agree	Disagree	Strongly Disagree	Not Applicable
1. The educational specialist makes me feel comfortable in contacting her/him.					
2. The educational specialist communicates in an understandable way.					
3. The educational specialist provides helpful information during conferences.					
4. The educational specialist addresses my concerns.					
5. The educational specialist communicates with me concerning my child in a timely manner.					
6. The educational specialist offers additional help when necessary.					
7. The educational specialist assigns an appropriate amount of work.					
8. The educational specialist provides strategies to my child that can be worked on independently.					
9. The educational specialist sets high expectations and helps my child to reach them.					
10. The educational specialist assists me in working with teachers, school staff, and others on behalf of my child.					
11. The educational specialist remains focused on the best interest of my child.					
*					

*Add other elements if needed, such as school-wide goals, or subject specific-elements.

Please use this space to comment on the outstanding strengths and/or weaknesses of the educational specialist and/or the program. Thank you for your assistance.

Client Survey Summary

Educational Specialist: _____ School Year: _____

Grade(s): _____ Position: _____

Client Survey Group? _____

Number of Surveys Distributed	Number of Completed Surveys Returned	Percentage of Completed Surveys Returned

Client Satisfaction Analysis

Describe your survey population(s) (i.e., list appropriate demographic characteristics such as grade level and subject for students).

List factors that might have influenced the results (e.g., survey was conducted as the bell rang for dismissal).

Analyze survey responses and answer the following questions:

A) What did clients perceive as your major strengths?

B) What did clients perceive as your major weaknesses?

C) How can you use this information for continuous professional growth?

This form should be placed in the Documentation Log.

Student Learning/Program Objective Progress Form

Directions: This form is a tool to assist educational specialists in setting an objective that results in measurable learner/program progress. **NOTE:** When applicable, learner progress should be the focus of the objective.

Educational Specialist: _____ School Year: _____

Grade(s): _____ Position: _____

Initial Objective Submission (due by _____ to the evaluator)

I. Setting (Describe the population and special learning circumstances)		
II. Content/Subject/Field Area (The area/topic addressed based on learner needs, data analysis, or observational data)		
III. Baseline Data (What is shown by the current data?)	☐ Data attached	
IV. Objective Statement (Describe what you want learners/program to accomplish)		
V. Means for Attaining Objective (Strategies used to accomplish the objective)		
Strategy	Evidence	Target Date

Educational Specialist's Signature: _____ Date: _____

Evaluator's Signature: _____ Date: _____

VI. Mid-Year Review (Describe objective progress and other relevant data)	Mid-year review conducted on _____ Initials: _____ (educational specialist) _____ (evaluator) ☐ <i>Data attached</i>
---	--

Educational Specialist's Signature: _____ Date: _____

Evaluator's Signature: _____ Date: _____

End-of-Year Review

☐ Appropriate Data Received

Strategies used and data provided demonstrate appropriate learner/program growth ☐ Yes ☐ No

Evaluator's Signature: _____ Date: _____

Summative Performance Report

Directions: Evaluators use this form at the end of the school year to provide educational specialists with an assessment of performance. The educational specialist should receive a copy of the form. The signed form is submitted to the site administrator within 10 calendar days of the summative evaluation meeting. **Note:** Three or more "partially effective" ratings on individual performance standards will result in an overall "partially effective" or "ineffective" rating. Similarly, one "ineffective" rating on a performance standard may result in an overall "ineffective" rating.

Educational Specialist: _____ Grade/Subject: _____

Evaluator: _____ Date: _____

Contract Status: _____

Documentation Reviewed: ☐ Documentation Log ☐ Student Learning/Program Objective Progress Form
☐ Observation/Formative Feedback Forms ☐ Other _____

Performance Standard 1: Professional Knowledge

Highly Effective <i>In addition to meeting the requirements for Effective...</i>	Effective <i>Effective is the expected level of performance.</i>	Partially Effective	Ineffective
The educational specialist uses professional knowledge to lead or engage others to address the needs of the target learning community while demonstrating respect for individual differences of cultures, backgrounds, and learning needs.	The educational specialist uses professional knowledge to address the needs of the target learning community while demonstrating respect for individual differences, cultures, and learning needs.	The educational specialist inconsistently uses professional knowledge to address the needs of the target learning community and/or inconsistently demonstrates respect for individual differences, cultures, and learning needs.	The educational specialist consistently demonstrates a <i>lack of professional knowledge</i> regarding the needs of the target learning community or <i>rarely</i> demonstrates respect for individual differences and understanding of cultures, backgrounds, and learning needs.
☐	☐	☐	☐
Comments: 			

Performance Standard 2: Program Planning and Management

Highly Effective <i>In addition to meeting the requirements for Effective...</i>	Effective <i>Effective is the expected level of performance.</i>	Partially Effective	Ineffective
The educational specialist engages others in the design of plans, and coordinates, and manages programs and services consistent with established guidelines, policies, and procedures. The work impacts the wider learning community.	The educational specialist plans, coordinates, and manages programs and services consistent with established guidelines, policies, and procedures.	The educational specialist attempts, but <i>inconsistently</i> plans, coordinates, and manages programs and services consistent with established guidelines, policies, and procedures.	The educational specialist <i>rarely</i> plans, coordinates, and manages programs and services consistent with established guidelines, policies, and procedures.
☐	☐	☐	☐
Comments:			

Performance Standard 3: Program Delivery

Highly Effective <i>In addition to meeting the requirements for Effective...</i>	Effective <i>Effective is the expected level of performance.</i>	Partially Effective	Ineffective
The educational specialist uses professional knowledge in an innovative manner to provide a variety of exceptional services for the targeted learning community.	The educational specialist uses professional knowledge to implement a variety of services for the targeted learning community.	The educational specialist attempts to use professional knowledge to implement services, but efforts are <i>inconsistent</i> in addressing the needs of the targeted learning community.	The educational specialist <i>rarely</i> uses professional knowledge to implement services to meet the needs of the targeted learning community.
☐	☐	☐	☐
Comments:			

Performance Standard 4: Assessment

Highly Effective <i>In addition to meeting the requirements for Effective...</i>	Effective <i>Effective is the expected level of performance.</i>	Partially Effective	Ineffective
The educational specialist <i>consistently demonstrates a high level</i> of performance and takes a leadership role in gathering, analyzing and using data to guide instructional and program planning, and provides timely feedback to learners, families, staff, and the community.	The educational specialist gathers, analyzes, and uses data to determine learner/program needs, measure learner/program progress, guide instruction and intervention, and provide timely feedback to learners, families, staff, and the community.	The educational specialist attempts, but is <i>inconsistent</i> in gathering, analyzing, and using data, and/or providing timely feedback to learners, families, staff, and the community.	The educational specialist <i>rarely</i> uses data to measure learner progress, implement program planning, guide instruction, or to provide timely feedback to learners, families, staff, and the community.
☐	☐	☐	☐
Comments:			

Performance Standard 5: Communication and Collaboration

Highly Effective <i>In addition to meeting the requirements for Effective...</i>	Effective <i>Effective is the expected level of performance.</i>	Partially Effective	Ineffective
The educational specialist demonstrates initiative in enhancing effective communication and collaboration techniques between the learners, families, staff, and the community.	The educational specialist communicates and collaborates appropriately with learners, families, staff, and the community to promote student learning and well-being.	The educational specialist attempts, but is <i>inconsistent</i> in communicating and has difficulty collaborating with learners, families, staff, and the community.	The educational specialist <i>rarely</i> communicates and collaborates appropriately with learners, families, staff, and the community.
☐	☐	☐	☐
Comments:			

Performance Standard 6: Professionalism

Highly Effective <i>In addition to meeting the requirements for Effective...</i>	Effective <i>Effective is the expected level of performance.</i>	Partially Effective	Ineffective
The educational specialist is a professional role model for others, engages <i>in a high level</i> of personal professional growth, and/or contributes to the development of others and the well-being of the profession.	The educational specialist exhibits behavior consistent with legal, ethical, and professional standards, contributes to the profession, and engages in professional growth.	The educational specialist demonstrates limited understanding of professional ethics, <i>inconsistently</i> participates in professional growth opportunities or <i>inconsistently</i> applies learning from professional development in a way that contributes to the profession.	The educational specialist <i>exhibits unethical behavior, rarely</i> participates in professional growth opportunities or <i>rarely</i> applies learning from professional development in a way that contributes to the profession.
☐	☐	☐	☐
Comments:			

Performance Standard 7: Learner/Program Progress

Highly Effective* <i>In addition to meeting the requirements for Effective...</i>	Effective <i>Effective is the expected level of performance.</i>	Partially Effective	Ineffective
The work of the educational specialist results in <i>a high level</i> of learner progress with all populations and/or program progress.	The work of the educational specialist results in acceptable and measurable learner or program progress based on established standards and/or school goals.	The instructional efforts of the educational specialist result in <i>inconsistent</i> learner/program progress; more progress is needed to meet established standards.	The work of the educational specialist <i>rarely</i> results in acceptable learner progress and/or program progress.
☐	☐	☐	☐
Comments:			

Evaluation Summary

- ☐ Recommended for continued employment.
- ☐ Recommended for placement on a *Performance Improvement Plan*. (One or more standards are *ineffective* or two or more standards are *partially effective*.)
- ☐ Recommended for Dismissal/Non-renewal. (The educational specialist has failed to make progress on a *Performance Improvement Plan*, or the educational specialist consistently performs below the established standards, or in a manner that is inconsistent with the school's mission and goals.)

Commendations:

Areas Noted for Improvement:

Educational Specialist Improvement Goals:

Schools that decide not to calculate a single summative rating should delete this box.

Overall Evaluation Summary Criteria

☐ Highly Effective

☐ Effective

☐ Partially Effective

☐ Ineffective

Educational Specialist's Signature: _____ Date: _____

Signature denotes the review occurred, not necessarily agreement with the final recommendation.

Evaluator's Signature: _____ Date: _____

Site Administrator's Signature: _____ Date: _____

Support Dialogue Form

Directions: Educational specialists and evaluators may use this form to facilitate discussion on areas that need additional support. This form is optional.

What is the area of targeted support?

What are some of the issues in the area that are causing difficulty?

What strategies have you already tried and what was the result?

What new strategies or resources might facilitate improvement in this area?

Educational Specialist's Name: _____

Educational Specialist's Signature: _____ Date: _____

Evaluator's Name: _____

Evaluator's Signature: _____ Date: _____

Performance Improvement Plan Form

Educational Specialist: _____ Grade/Subject: _____

Evaluator: _____ School: _____

Performance Standard Number	Performance Deficiencies within the Standard to be Corrected	Resources/Assistance Provided Activities to be Completed by the Educational Specialist	Target Dates

_____ Evaluator's Signature/Date Initiated	The educational specialist's signature denotes receipt of the form, and acknowledgment that the evaluator has notified the educational specialist of ineffective performance. _____ Educational Specialist's Signature/Date Initiated
--	--

Results of Performance Improvement Plan¹:

Performance Standard Number	Performance Deficiencies within the Standard to be Corrected	Comments	Review Dates ²

Final recommendation based on outcome of Improvement Plan:

- ☐ The performance deficiencies have been satisfactorily corrected: The educational specialist is no longer on a *Performance Improvement Plan*.
- ☐ Partial improvement has been achieved but more improvement is needed; the educational specialist remains on a *Performance Improvement Plan*
- ☐ The deficiencies were not corrected: The educational specialist is recommended for non-renewal/dismissal.

Evaluator's Signature/Date Reviewed

Educational Specialist's Signature/Date Reviewed
Signature denotes the review occurred, not necessarily agreement with the final recommendation.

¹ These sections are to be completed collaboratively by the evaluator and the educational specialist. Pages may be added, if needed.

² Review dates should be prior to target dates for each improvement objective. Each review is intended to document support and assistance provided to the educational specialist.

____ Additional Pages Attached

New Jersey Specific Requirements

APPENDIX 2023-2024

Nancy Richmond, Ed.D.
April Gonzalez, Stronge & Associates New Jersey Coordinator

This appendix articulates the evaluation requirements mandated by the State of New Jersey. Districts should follow this guidance when implementing the Stronge Teacher Effectiveness Performance Evaluation System. Please contact April Gonzalez at (757) 797-9662 or april.gonzalez@strongeandassociates.com if you have questions.

Evaluating Educational Services Professionals and Other Specialists

While a number of educators in public schools are not classroom teachers, they play very important roles in the overall educational development of students. These educators provide academic and personal counseling, serve on Child Study Teams, and support athletic programs. Their roles include library/media specialists, school nurses, school psychologists, school social workers, occupational therapists, in addition to many other positions important to our state's schoolchildren. Together, these roles constitute nearly 20% of certificated educators. All New Jersey students deserve to attend schools with high-quality professionals serving in these positions, and all of these professionals deserve meaningful opportunities for growth. - TEACHNJ Act, 2012

The information in this appendix applies to Education Specialists as well as Teachers.

Formal Observations

The New Jersey Department of Education (NJDOE) has specified the following observation requirements:

- **Non-tenured Teachers in Years 1 - 4:** Three observations; each observation at least 20 minutes; face-to-face post-observation conference required after each observation. Multiple observers are required.
- **Tenured teachers:** Two observations; each observation at least 20 minutes; at least one face-to-face post-observation conference required. Multiple observers are *recommended*.
- **CAP Teachers:** One additional observation required.

Figure A1: *Observation Requirements*

Teacher Group	Number of required observations	Length of observations
Non-tenured teachers, years 1 - 4	3 observations	20 minutes (minimum)
Tenured teachers	2 observations	20 minutes (minimum)
CAP teachers	1 additional observation	20 minutes (minimum)

Within the minimum requirements, all teachers must have at least one unannounced and one announced observation. A pre-observation conference is required for announced observations. The post-observation conference must be held prior to further evaluative observations. Additional observations for any staff member will be at the site administrator's discretion.

After the first year, teachers who receive an overall *ineffective* or *partially effective* rating on their summative evaluation (and therefore on a Corrective Action Plan) are required to have one additional observation, and multiple observers are required.¹

The NJDOE provided notification of Educator Evaluation Rubric Weights for the 2023-2024 school year indicating that the department is committed to the continuous improvement of fair and equitable evaluations for all New Jersey educators. With this in mind, evaluation rates for the 2023-2024 school year will remain unchanged.²

Measures of Student Progress

The New Jersey Department of Education has specified that Student Achievement (Standard 7 in the Stronge Evaluation System) will account for 15% of the evaluation for teachers. The sections below explain two such measures – Student Growth Percentiles (SGPs) and Student Growth Objectives (SGOs).³

Student Growth Percentile Score (SGP)

Student growth percentiles (SGPs) describe the progress students make from one year to the next compared to students with similar state standards-based achievement test history. This provides an understanding of how much progress students made based on where they started – regardless of whether they started as low, moderate, or high achieving students.

For mSGP to be part of a teacher's evaluation, the teacher must be:

- a. Assigned to a 4th-8th grade English language arts or 4th-7th grade mathematics course for 60% or more of the year prior to the date on which the state test was administered, and

¹ AchieveNJ, Teacher Practice as per NJDOE updated September 2021

² AchieveNJ, Educator Evaluation Guidance for 2023-2024 as per NJDOE Broadcast August 2, 2023

³ AchieveNJ, Teacher Practice

- b. Assigned 20 unique students by the district through the Course Roster Submission during the school year of the evaluation, or the combination of up to two previous years plus the current year.
- c. These students must be enrolled for 70% or more of the course duration prior to the administration of the test.

Although teachers receiving an mSGP score must only complete one Student Growth Objective (SGO), it is the strong recommendation of the NJDOE for all teacher to write two. If a teacher does not write two SGO's and fall below the 20 unique student mark, they will not be eligible to receive a summative score.¹

Student Growth Objectives (SGO)

The *Student Outcome Measures* section of the handbook contains a detailed description of the Student Learning Objectives (SLO) process. In New Jersey, SLOs are referred to as Student Growth Objectives (SGOs). While the handbook contains an extensive description of this process, the most valuable source of information about the use of SGOs is through the most recent NJDOE/AchieveNJ guidance:²

The NJDOE notes that although teachers receiving an mSGP score must only complete one Student Growth Objective (SGO), it is the strong recommendation of the NJDOE for all teachers to write two. If a teacher does not write two SGO's and fall below the 20 unique student mark, they will not be eligible to receive a summative score. The NJDOE also offers on-line training in the development and monitoring of the SGO process at:

<https://www.state.nj.us/education/AchieveNJ/teacher/videos/>

The summative rating for all teachers shall include student growth objectives (SGOs) and teacher practice as per NJDOE guidelines, 2023-2024. The following NJDOE guidelines, established in 2014-15, remain in effect for the 2023-24 school year.³

1. Teachers who do not receive SGP scores must set 2 SGOs.⁴ For teachers who receive SGP scores it is strongly recommended that they set 2 SGOs.
2. A teacher develops SGOs in consultation with (and with the approval of) his or her principal.
3. SGOs must be aligned to New Jersey Student Learning Standards and measure student achievement and/or growth between two points of time.

¹ AchieveNJ, Educator Evaluation Guidance for 2023-2024 as per NJDOE Broadcast August 2, 2023

² AchieveNJ, Teacher Practice as per NJDOE updated September 2021

³ AchieveNJ, Educator Evaluation Guidance for 2023-2024 as per NJDOE Broadcast August 2, 2023

⁴ AchieveNJ, Student Growth Objectives as per NJDOE updated October, 2017

4. SGOs must be specific, measurable and based on students' prior learning data when available.
5. A teacher's final SGO rating is determined by the principal.
6. Administrators are required to complete annual SGO training.

SMART Acronym

New Jersey uses a slightly different acronym for SMART objectives¹ than depicted in the main handbook.

Figure A2: *Acronym for Developing Student Growth Objectives*

S pecific:	How many students learn what or grow by how much?
M easurable:	Use assessments to compare <u>starting points</u> to <u>ending points</u>
A mbitious, but achievable:	Determine a <u>reasonable amount of growth</u>
R elevant:	Aligned to <u>standards</u>
T ime-bound:	Set an appropriate instructional period

SGO Scoring²

School districts will comply with New Jersey Department of Education guidelines to determine a method by which to rate student growth objective achievement as *exceptional*, *full*, *partial*, or *insufficient*. These criteria should be communicated to teachers at the beginning of the year.

The specific approach to scoring an SGO must be determined at the local level (district and school) and will depend in large part on the approach the individual teacher is taking, the subject that is being taught, and the quality of the assessment being used.

The figure below provides the NJDOE's basic example of SGO scoring (details of the actual goal are omitted).

¹ AchieveNJ, Teacher Practice as per NJDOE updated September 2021

² AchieveNJ SGO Training Module One, May 7, 2013

Figure A3: *Example SGO Scoring Plan* (for 60 Students from 2 Class Periods)

Class Size	Objective Attainment Based on Number of Students Achieving Target/Growth Score			
	4	3	2	1
60 students	*90% (54 or more Students)	80% (48 -53 Students)	70% (42-47 Students)	70% or less (Fewer than 42 students)

*These numbers will be determined by the teacher and principal based on knowledge of students to create a rigorous and attainable goal.

In scoring an SGO, the 1 – 4 rating should be based on the number of targeted students that reached the goal (teachers may set SGOs for specific groups of students, rather than a whole class). As noted in Figure A3, this number can be expressed as a percentage or as a whole number. An SGO form and SGO scoring for are available on certain software platforms.

Key Dates¹

Please remember these key upcoming dates and ensure that all educators are trained prior to evaluations occurring:

1. All teachers who are to be evaluated and receive summative scores must be notified of policies and procedures related to the evaluation rubrics by **October 1**.
2. Student Growth Objectives, Professional Development Plans (PDPs) and Corrective Action Plans (CAPs) must be in place by **October 31**. **PDPs for staff hired during the school year must be in place** within 30 instructional days of arrival in the district.

Summative Evaluation

Pursuant to N.J.A.C. 6A:10-4.1(d) and 5.1(d), the chart below lists the evaluation component weights for the 2023-2024 school year.

Type of Educator	Evaluation Component Weights
mSGP Teachers	- Teacher Practice: 70% - SGO: 25% - mSGP: 5%
Non-mSGP Teachers	- Teacher Practice: 85% - SGO: 15%

¹ AchieveNJ, Educator Evaluation Guidance for 2023-2024 as per NJDOE Broadcast August 2, 2023

Figure A4: *mSGP Teacher Evaluation Percentages*¹

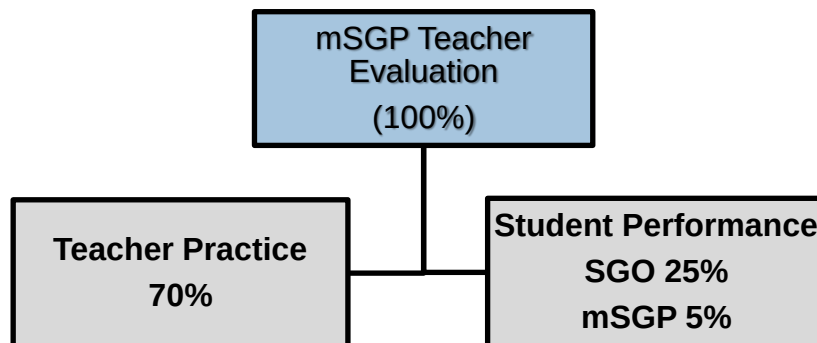


Figure A4 depicts how Teacher Practice and Student Performance are calculated in the teacher's summative evaluation for those teachers who receive an mSGP score and SGO score. Teacher Practice, based on Stronge Standards 1 – 6, counts for 70% of the summative evaluation and Student Performance counts for 30% (based on SGO scores and mSGP scores).

Figure A5: *SGO Teacher Evaluation Percentages*²

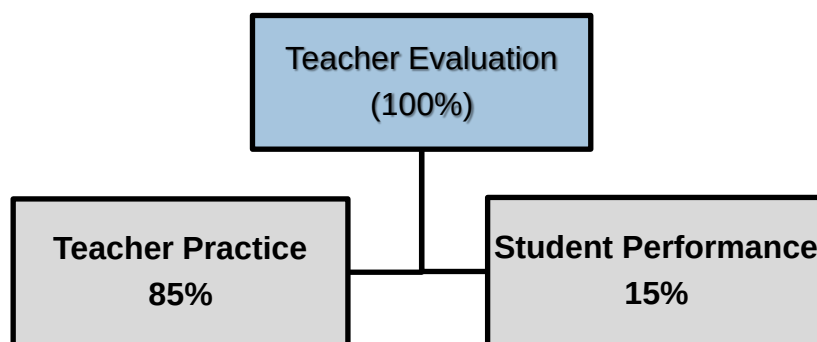


Figure A5 depicts how Teacher Practice and Student Performance are calculated in the teacher's summative evaluation for those teachers who receive an SGO score. Teacher Practice, based on Stronge Standards 1 – 6, counts for 85% of the summative evaluation and Student Performance counts for 15% (based on SGO scores).

¹ AchieveNJ, Educator Evaluation Guidance for 2023-2024 as per NJDOE Broadcast August 2, 2023

² AchieveNJ, Educator Evaluation Guidance for 2023-2024 as per NJDOE Broadcast August 2, 2023

Figure A6 shows the weighting of each standard taking into account the weighting for the Teacher Practice and Student Achievement components prescribed by the NJDOE, 2023-2024.¹

Figure A6: *Weighting of Performance Standards*

Component		Weights
Teacher Practice (Standards 1-6)	Standard 1	14.16%
	Standard 2	14.16%
	Standard 3	14.16%
	Standard 4	14.16%
	Standard 5	14.16%
	Standard 6	14.16%
Student Achievement (Standard 7)	SGOs	15%

Scores will be calculated using the following scale:

Ineffective = 1

Partially Effective = 2

Effective = 3

Highly Effective = 4

Final Summative Rating Calculation Examples

Once the scores for all evaluation measures are finalized, each educator will receive a final summative rating on a scale from 1 – 4. The overall summative rating will be judged as *highly effective*, *effective*, *partially effective*, or *ineffective* using the scale in Figure A7 released by the NJDOE.²

Figure A7: *Summative Rating Performance Level Ranges*³

Ineffective	Partially Effective	Effective	Highly Effective
1.0-1.84	1.85-2.64	2.65-3.49	3.50 – 4.00

¹ AchieveNJ, Educator Evaluation Guidance for 2023-2024 as per NJDOE Broadcast August 2, 2023

² AchieveNJ, Educator Evaluation Guidance for 2023-2024 as per NJDOE Broadcast August 2, 2023

³ <https://www.nj.gov/education/AchieveNJ/resources/scoring.shtml>

Figure A8 illustrates the conversion of the raw score for each component of teacher evaluation multiplied by its weight to result in a final summative score.

Figure A8: *Summative Calculation*

Component	Raw Score	Weight	Weighted Score
	1 = Ineffective 2 = Partially Effective 3 = Effective 4 = Highly Effective		
Standard 1	3	14.16%	.424
Standard 2	3	14.16%	.424
Standard 3	3	14.16%	.424
Standard 4	4	14.16%	.566
Standard 5	3	14.16%	.424
Standard 6	2	14.16%	.283
SGOs	3	15%	.450
			2.99

In the example above, the teacher received a final score of 2.99 which results in a summative rating of *effective*.

In compliance with NJDOE guidelines, a teacher who receives a summative rating of *partially effective* or *ineffective* must be placed on a *Corrective Action Plan*.

Flexible Option for Evaluating *Highly Effective* Teachers

To innovate and differentiate evaluations for teachers at varying points in their practice and to give teachers a more active role in their evaluations, the NJDOE has increased flexibility for teachers who are rated *highly effective*.

Teachers who are rated *highly effective* on their most recent evaluation have the option of having one observation based on a portfolio of practice chosen from a NJDOE Commissioner-approved list including:

- Reflective Practice Protocol
- Coaching a clinical intern
- Participating in the National Board Certification process

Completion of one of the Commissioner-approved options, including a conference with the teacher's supervisor, will replace one traditional classroom observation. This protocol must be used to inform the summative evaluation. The optional approach must be agreed to by both teachers and administrators.

Co-observations¹

Each administrator who supervises and evaluates teachers will participate in two co-observations each school year.

- If a co-observation is conducted, the observation may count as one of the teacher’s required observations. If used as an observation, the final observation score is determined by the teacher’s **designated supervisor**.
- A co-observation fulfills the requirement of multiple observers.
- **Multiple observers** are required for all non-tenured teachers and those on CAPs. Multiple observers are not required in districts that employ only one administrator.

Improving Professional Performance

The *Support Dialogue* and *Performance Improvement Plan* are described in the main section of the Stronge handbook. A third tool, the *Corrective Action Plan*, is mandated by NJDOE for teachers whose overall summative evaluation rating is *partially effective* or *ineffective*.

Figure A8 shows the differences between these processes in New Jersey.

Figure A8: *Tools to Increase Professional Performance*

	Support Dialogue	Performance Improvement Plan	Corrective Action Plan
Purpose	For teachers who are in need of additional support. These teachers attempt to fulfill the standard but are often deficient in an area.	For teachers: • who have not made sufficient progress as a result of a Support Dialogue; • whose professional practice would benefit from additional support; • who receive two or more “not evident” ratings on an interim review; or • who receive two or more standards rated as <i>partially effective</i> or one or more standards rated as <i>ineffective</i> on a summative evaluation.	For teachers whose overall summative evaluation rating is <i>partially effective</i> or <i>ineffective</i>
Initiates Process	Evaluator, administrator, or teacher	Evaluator	Evaluator* (required by NJDOE)

¹ N.J.A.C. 6-A: 10-4.3

	Support Dialogue	Performance Improvement Plan	Corrective Action Plan
Documentation	Form provided: <i>Support Dialogue Form (optional)</i> Memo or other record of the discussion/other forms of documentation at the building/worksite level	Form provided: <i>Performance Improvement Plan Form</i>	Form required: <i>Corrective Action Plan</i> Building/Worksite Level Superintendent is informed Human Resource Department is notified
Outcomes	• Performance improves to proficient level – no more support needed at this time • Some progress – continued support • Little or no progress – teacher moved to a <i>PIP</i>	• Sufficient improvement – no longer on <i>PIP</i> • Some progress, but more needed –continue on <i>PIP</i>	• Sufficient improvement – recommendation to continue employment • Inadequate improvement – recommendation to non-renew or dismiss the employee

*The evaluator for teachers may be the principal or district supervisor. If a designee, an assistant principal, for example, has been collecting documentation such as observations, the evaluator and the principal confer about the *Corrective Action Plan*. The evaluator is responsible for the overall supervision of personnel in the worksite/department/school and as such monitors the *Corrective Action Plan* and makes the recommendation to the superintendent about the employee's progress.

Corrective Action Plan

Teachers who receive an overall summative rating of *partially effective* or *ineffective* will be placed on a *Corrective Action Plan*, per NJDOE. Evaluators should follow district or NJDOE guidance related to *Corrective Action Plans*. A suggested *Corrective Action Plan Form* is shown on the following page. Observations may not occur between receipt of summative score and implementation of the CAP.

Corrective Action Plan Form

Teacher: _____ School: _____

Grade/Subject: _____ School Year: _____

Evaluator: _____ Date: _____

Area of Concern Related to Performance Standard _____:

Evidence for Concern:

Activity	Timeline	Administrative Responsibility	Teacher Responsibility	Evidence of Successful Completion
1.				
2.				
3.				
4.				

Teacher Signature: _____ Date: _____

Evaluator's Signature: _____ Date: _____

Activity #1: Date Completed: _____ Activity #2: Date Completed: _____

Activity #3: Date Completed: _____ Activity #4: Date Completed: _____

Teacher Comments:

Evaluator Comments:

Use a separate page for each identified deficiency.

REFERENCES

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