

2026-2027 APPRAISAL GUIDEBOOK

The Dallas Independent School District's Board of Trustees prioritizes measurable improvement of student outcomes. While this work relies on the dedication and performance of teachers and school leaders, central staff and campus support team members play a crucial role in reaching these goals by supporting the work of instructional staff and facilitating organizational conditions for success.

To continue improving student achievement in Dallas ISD, each of the district's 20,000+ team members, including the 10,000 non-instructional staff, must be working toward a singular vision, focusing on shared outcomes, and striving for excellence. CMS is an approved appraisal instrument for central staff appraisers/supervisors to complete team members' annual performance appraisal, as dictated per district board policy.

OVERVIEW

The performance review process occurs in three phases within the annual appraisal cycle: Beginning of year goal setting and planning, Mid-year review, and End of year evaluation.

Phase 1: Beginning of year planning and goal setting conference

During the planning/goal setting conference, appraisers ensure that team members understand their job roles and responsibilities, goals, and expected professional standards of conduct. All team members will be accountable for the development and accomplishment of individual goals that align with those of the team and department.

Phase 2: Mid-year review conference

During the mid-year review conference, team members complete a self-review and appraisers meet in person with team member to assess areas of strength and growth. The appraiser reviews, revises, and realigns the team member's goals with the needs and the goals of the district, department, or campus. If necessary, an individual intervention plan is developed to address performance that is not meeting expectations.

Phase 3: End of year review conference

During the end of year review conference, appraisers conduct a final review of performance and individual goal ratings and discuss areas of commendation and growth with the team member.

APPRAISAL CYCLE TIMELINE

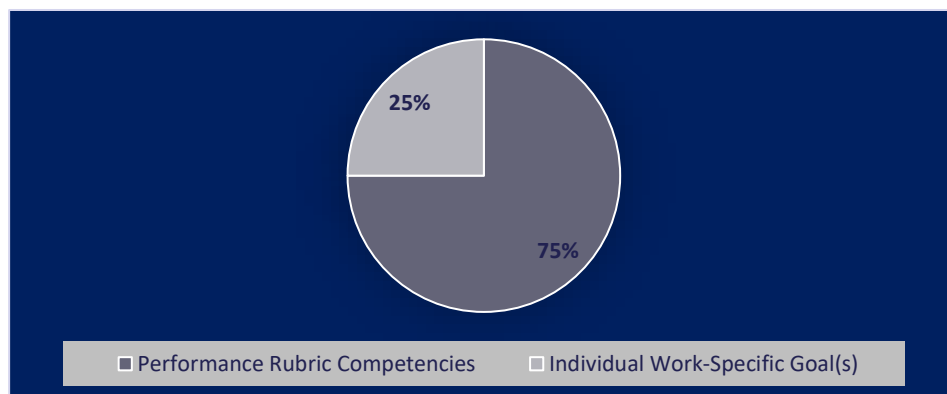
Phase	Mode & Responsibility		Timeframe	Action
Phase 1: Beginning of Year	Online	Team member	September / October	❖ Log into Cornerstone (https://dallasisd.csod.com) ❖ Complete and Submit goal setting task
	Online and Face-to-Face or Virtual	Appraiser		❖ Schedule and hold the goal setting conference to discuss job responsibilities, expectations, and goals ❖ Log into Cornerstone (https://dallasisd.csod.com) ❖ Complete and Submit the goal setting task for the team member
Phase 2: Mid-Year	Online	Team member	January / February	❖ Log into Cornerstone (https://dallasisd.csod.com) ❖ Complete the assigned mid-year self-review task
	Online and Face-to-Face or Virtual	Appraiser	February / March	❖ Log into Cornerstone (https://dallasisd.csod.com) to review team member's mid-year review ❖ Schedule and hold the mid-year review conference ❖ Edit team member's individual goals if needed ❖ Submit the team member's mid-year conference acknowledgment task online
Phase 3: End of Year*	Online and Face-to-Face or Virtual	Appraiser	May / June *	❖ Log into Cornerstone (https://dallasisd.csod.com) ❖ Complete the assigned annual review and conference acknowledgment for (TEAM MEMBER NAME) task; SAVE AND EXIT ❖ Schedule and hold the annual review and conference ❖ Log into Cornerstone (https://dallasisd.csod.com) and SUBMIT the Review
	Online	Team member	May / June <i>Within ten (10) days of Appraiser Review submission</i>	❖ Log into Cornerstone (https://dallasisd.csod.com) to acknowledge/sign review and submit comments

** End of year review dates may be shifted to align with contract/work calendar end dates where applicable*

EVALUATION COMPONENTS

The team member review consists of two components:

- ❖ **75% Performance Rubric Competencies:** Evaluation of set of competencies from four domains: Shaping Culture, Developing Talent, Driving Impact, and Engaging Stakeholders
- ❖ **25% Individual Work-Specific Goal(s):** Accomplishment of 3 rigorous, SMART goals, to be tracked and accomplished between September 1, 2026 and June 30, 2027 (or end of contract/work calendar date)



PERFORMANCE RUBRIC COMPETENCIES

Drawing from past evaluation systems, stakeholder input, and current best practices in performance management, the CMS Performance Rubric was developed as a means of setting expectations for team member performance around four core domains: **Shaping Culture**, **Developing Talent**, **Driving Impact**, and **Engaging Stakeholders**.

- ❖ **Shaping Culture** Central Staff contribute positively to the District through ethical decision making and professionalism
- ❖ **Developing Talent** Central Staff identify opportunities and take action to develop self, peers, teams, and divisions
- ❖ **Driving Impact** Central Staff impact the District with high levels of productivity
- ❖ **Engaging Stakeholders** Central Staff communicate in ways that build trust, develop positive relationships, and promote equity

The CMS Performance Rubric adapts its valuation of excellence by layering additional responsibilities onto team member expectations depending on the requirements of their position: **Leader of Self**, **Leader of Others**, and **Leader of Teams**.

- ❖ Team members on CMS who do not supervise others are evaluated under the **Leader of Self** category
- ❖ Team members on CMS who formally manage or supervise at least one team member are evaluated under the **Leader of Others** category
- ❖ Team members on CMS who hold a title of Director or higher are evaluated under the **Leader of Teams** category

	Leader of Self	Leader of Others	Leader of Team(s)
	No Supervisory Responsibility (Admin Asst., Specialist, Coordinator, Analyst)	Supervises People (Lead, Manager, Supervisor)	Leads Direction of Work (Director, Exec Dir, Deputy Chief, Asst. Supt)
Culture	1.1, 1.2	1.1, 1.2, 1.3	1.1, 1.2, 1.3
Talent	2.1, 2.2	2.1, 2.2, 2.3, 2.4	2.1, 2.2, 2.3, 2.4, 2.5
Impact	3.1, 3.2, 3.3	3.1, 3.2, 3.3, 3.4, 3.5, 3.6	3.1, 3.2, 3.3, 3.4, 3.5, 3.6, 3.7
Stakeholders	4.1, 4.2	4.1, 4.2, 4.3	4.1, 4.2, 4.3, 4.4
# Indicators	9	16	19

CMS PERFORMANCE RUBRIC DOMAINS & INDICATORS

LEAD DEVELOP APPRAISE CMS CAREER MANAGEMENT SYSTEM  PERFORMANCE RUBRIC			
DOMAIN 1: Shaping Culture		LEADER OF SELF	LEADER OF OTHERS
Team members contribute positively to the District through ethical decision making and professionalism.			LEADER OF TEAMS
1.1 Promotes Organizational Vision, Mission, and Goals		Y	Y
1.2 Adapts to Change		Y	Y
1.3 Creates Positive Environment for Change		-	Y
DOMAIN 2: Developing Talent		LEADER OF SELF	LEADER OF OTHERS
Team members identify opportunities and take action to develop self, peers, teams, and departments.			LEADER OF TEAMS
2.1 Possesses Growth Mindset		Y	Y
2.2 Prioritizes Learning		Y	Y
2.3 Selects, Hires, and Plans for Employee Succession		-	Y
2.4 Ensures High Performance of Direct Reports		-	Y
2.5 Promotes Effective Management		-	-
DOMAIN 3: Driving Impact		LEADER OF SELF	LEADER OF OTHERS
Team members impact the District with high levels of productivity.			LEADER OF TEAMS
3.1 Manages Time and Organizes Tasks for Success		Y	Y
3.2 Solves Problems		Y	Y
3.3 Demonstrates Mastery of Job-Specific Skills		Y	Y
3.4 Manages Projects		-	Y
3.5 Develops Strategic and Data-Driven Goals Others & Teams		-	Y
3.6 Focuses on Innovative and Strategic Decision Making		-	Y
3.7 Organizes Resources		-	-
DOMAIN 4: Engaging Stakeholders		LEADER OF SELF	LEADER OF OTHERS
Team members communicate in ways that build trust, develop positive relationships, and promote equity.			LEADER OF TEAMS
4.1 Communicates Professionally and Effectively		Y	Y
4.2 Builds Positive Relationships with Internal and External Stakeholders		Y	Y
4.3 Builds High-Performing Teams			Y
4.4 Leverages Cross-Departmental Collaboration		-	
		-	-

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PERFORMANCE RUBRIC

Performance Level Definitions

Exemplary	Proficient	Progressing	Unsatisfactory
The exemplary team member is considered a role model that habitually exhibits exceptional performance translating to high levels of achievement of department and/or team goals. They show evidence of in-depth expertise along with superior ability to implement and integrate the essential functions of the position. Their work and interactions are always culturally appropriate, focused on providing unparalleled customer service, and branded with high expectations for themselves and their team. The exemplary team member's impact is not limited to their team but is department and/or districtwide. They possess a growth mindset that facilitates productive collaboration and compelling mentorship of colleagues. They are highly motivated, showing initiative and requiring minimal supervision to move their work forward. Team members performing at this level are uniquely creative, innovative, or positively influential. They are considered "irreplaceable."	The proficient team member is a valued team member who demonstrates consistent favorable performance that translates to the team meeting most performance goals. There is evidence of substantial expertise along with implementation and integration of the essential functions of the position. Proficient team members participate in professional learning opportunities and are supportive of colleagues. This rating refers to a successful, professional team member that is consistently culturally responsive and customer service focused while maintaining high expectations for themselves. It is the expectation that most team members are consistently performing at a proficient level while simultaneously engaging in further development.	The progressing team member displays sporadic shifts in effectiveness. There is evidence of basic knowledge and skills needed for the position, but more consistent overall performance is required. They are cordial with colleagues, but collaboration and/or professional learning is occasional and typically initiated via mandates. This rating refers to team members who are occasionally culturally responsive and customer focused, and they uphold some expectations for themselves. This level of performance indicates that the team member's work product is inconsistent or ineffective, thus opportunities for improvement are warranted.	The unsatisfactory team member is considered ineffective. The team member shows little or no expertise and minimal initiative to achieve personal and/or team goals. The team member does not meet minimum performance standards and needs substantial improvement. This rating refers to work that is rarely culturally appropriate or customer focused. This level of performance is hindering the team member from achieving required goals or is harming the team and/or department from reaching collective goals. Significant improvement is needed.

PERFORMANCE RUBRIC

LEADER OF
SELF

LEADER OF
OTHERS

LEADER OF
TEAMS

Domain 1: Shaping Culture

Team members contribute positively to the District through ethical decision making and professionalism.

1.1: PROMOTES ORGANIZATIONAL VISION, MISSION, AND GOALS

PERFORMANCE DESCRIPTORS	Exemplary (4 Points)	Proficient (3 Points)	Progressing (2 Points)	Unsatisfactory (1 Point)
- Engages in decision making that is aligned to and supports District vision - Promotes high standards of conduct, ethical principles and integrity in decision making, actions, and behaviors - Adheres to: - Federal and state laws - Educator Code of Ethics - State statutes - Local school board policies, regulations, and practices	Seeks out or leads opportunities to enhance District programs and initiatives to advance the District vision Almost without exception, acts in a professional and culturally competent manner and proactively considers the feelings and perceptions of others Sets the example for others to emulate regarding integrity and ethical conduct Models confidentiality and handling and transmission of information with notable sensitivity Models compliance with District, division, and local policies and procedures	Participates in enhancing District programs and in initiatives to advance the District vision Habitually acts in a professional and culturally competent manner and is considerate of the feelings and perceptions of others Maintains integrity and ethical conduct Consistently maintains confidentiality and handles information with appropriate sensitivity Complies with District, division, and local policies and procedures	Engages in District programs and initiatives when directed or demonstrates sporadic effort to advance the District vision Demonstrates inconsistent professional or culturally competent behaviors, e.g. may not respond in a manner aligned to the situation; may not consider the feelings and perceptions of others Usually maintains integrity and ethical conduct Maintains confidentiality when requested; may not determine an appropriate level of sensitivity when handling information Most of the time complies with District, division, and local policies and procedures	Rarely engages in District programs and initiatives and rarely makes effort to advance the District vision Demonstrates insufficient professional or culturally competent behaviors, e.g. struggles to respond in a manner aligned to the situation; rarely considers the feelings and perceptions of others Struggles to maintain etiquette and ethical conduct Rarely maintains confidentiality or an appropriate level of sensitivity when handling information Rarely complies with District, division, and local policies and procedures

PERFORMANCE RUBRIC

LEADER OF
SELF

LEADER OF
OTHERS

LEADER OF
TEAMS

Domain 1: Shaping Culture

Team members contribute positively to the District through ethical decision making and professionalism.

1.2: ADAPTS TO CHANGE

PERFORMANCE DESCRIPTORS	Exemplary (4 Points)	Proficient (3 Points)	Progressing (2 Points)	Unsatisfactory (1 Point)
- Discerns the need to adjust behavior to improve performance - Responds appropriately to new information, changing conditions, or unexpected obstacles - Supports change and assists peers, when appropriate, as they work through change	Nearly always evaluates behaviors and responds effectively resulting in high levels of performance Proactively addresses new information, changing conditions, or unexpected obstacles to support and sustain high levels of performance Seeks and leverages opportunities to communicate and support positive changes in self and others	Evaluates behaviors and responds appropriately resulting in improved performance Addresses new information, changing conditions, or unexpected obstacles in support of continuous improvement Acknowledges or assists in positive changes in self and others	Sometimes evaluates behaviors; occasionally responds in ways that result in improved performance Accepts new information, changing conditions, or unexpected obstacles but response may not lead to improvement Sometimes acknowledges or assists in positive changes in self and others	Rarely evaluates behaviors; responds ineffectively resulting in little change to performance Rarely or fails to respond to new information, changing conditions, or unexpected obstacles Struggles to acknowledge or assist change in self or others

PERFORMANCE RUBRIC

Domain 1: Shaping Culture

Team members contribute positively to the District through ethical decision making and professionalism.

LEADER OF
OTHERS

1.3: CREATES POSITIVE ENVIRONMENT FOR CHANGE

LEADER OF
TEAMS

PERFORMANCE DESCRIPTORS	Exemplary (4 Points)	Proficient (3 Points)	Progressing (2 Points)	Unsatisfactory (1 Point)
- Communicates rationale and context for change - Implements initiatives or processes to enhance District goals and objectives - Creates a safe environment for risk-taking - Encourages employees to be innovative and creative - Stakeholders are empowered to be active in the reflections, decision making, and overall District/department culture	Proactively builds team members' capacity to explain, internalize, and take action on change processes leading to improved outcomes Effectively and proactively communicates rationale for change, thus enabling strong buy-in and stakeholder support Models and cultivates a collaborative environment that promotes: - Creativity - Risk-taking - Reflection - Acceptance	Engages in ongoing capacity building of team to explain, accept and support change processes Communicates rationale for change, thus enabling buy-in and stakeholder support Maintains a collaborative environment that usually promotes: - Creativity - Risk-taking - Reflection - Acceptance	Looks for ways to build team capacity to navigate change and is receptive to new ideas Occasionally communicates change without providing rationale resulting in inconsistent buy-in or stakeholder support Sporadically maintains a collaborative environment or sometimes promotes: - Creativity - Risk-taking - Reflection - Acceptance	Rarely builds team capacity to navigate change and struggles to accept new ideas Infrequently communicates changes resulting in limited buy-in or stakeholder support Rarely supports a collaborative environment and struggles to promote: - Creativity - Risk-taking - Reflection - Acceptance

Domain 2: Developing Talent

Team members identify opportunities and take action to develop self, peers, teams, and departments.

2.1: POSSESSES GROWTH MINDSET

PERFORMANCE DESCRIPTORS	Exemplary (4 Points)	Proficient (3 Points)	Progressing (2 Points)	Unsatisfactory (1 Point)
- Identifies areas for continuous improvement - Seeks out and is receptive to feedback and incorporates information into work - Acknowledges mistakes; reflects and adjusts accordingly	Continuously demonstrates self-reflection by requesting feedback from peers and supervisors leading to significant improvements in performance Proactively and effectively implements strategies from feedback, self-reflection, or professional learning resulting in significant improvement in achievement of individual or team goals Proactively acknowledges mistakes or reports errors; reflects to ensure limited recurrence of mistakes	Regularly demonstrates self-reflection and accepts feedback from peers and supervisors to improve performance Implements strategies from feedback, self-reflection, or professional learning resulting in improvement in achievement of individual or team goals Acknowledges mistakes and usually reflects and adjusts accordingly	Accepts feedback from peers and supervisors that sometimes leads to improved performance Occasionally implements strategies from feedback, self-reflection, or professional learning Inconsistently acknowledges mistakes; sometimes adjusts behavior when mistakes are identified	Seldom open to feedback from peers and supervisors Infrequently implements new strategies from feedback, self-reflection, or professional learning Struggles to acknowledge mistakes or does not adjust behavior when mistakes are identified

PERFORMANCE RUBRIC

LEADER OF
SELF

Domain 2: Developing Talent

Team members identify opportunities and take action to develop self, peers, teams, and departments.

LEADER OF
OTHERS

2.2: PRIORITIZES LEARNING

LEADER OF
TEAMS

PERFORMANCE DESCRIPTORS	Exemplary (4 Points)	Proficient (3 Points)	Progressing (2 Points)	Unsatisfactory (1 Point)
- Identifies and takes advantage of learning opportunities - Uses new knowledge and skills to improve work effectiveness - Shares knowledge and learning with others when appropriate	Proactively seeks out and actively participates in current job-embedded internal and external professional learning opportunities resulting in improved outcomes Habitually leverages new learning and skills to improve performance and outcomes of self and others	Actively participates in current job-embedded internal or external professional learning opportunities Leverages new learning and skills to improve performance of self and others	Sometimes participates in professional learning opportunities as assigned or engages passively in learning opportunities Sporadically leverages new learning or skills to improve performance of self or others or intermittently shares new learning and skills	Rarely participates in professional learning opportunities Fails to leverage or share new learning or skills to improve performance

PERFORMANCE RUBRIC

Domain 2: Developing Talent

Team members identify opportunities and take action to develop self, peers, teams, and departments.

LEADER OF
OTHERS

2.3: SELECTS, HIRES, AND PLANS FOR EMPLOYEE SUCCESSION

LEADER OF
TEAMS

PERFORMANCE DESCRIPTORS	Exemplary (4 Points)	Proficient (3 Points)	Progressing (2 Points)	Unsatisfactory (1 Point)
- Implements rigorous and equitable hiring practices - Provides new hires with the information and support to be successful - Defines job responsibilities and skills to be successful in each role throughout the employee life cycle - Conducts succession planning	Engages in a thorough talent review of current team before the applicant review and interview process to assist in determining the best candidate for hire aligned with team goals Proactively identifies and facilitates resource acquisition for new hires to ensure workflow continuity and improved outcomes Plans and conducts regular job description analysis, soliciting and incorporating comprehensive input from relevant stakeholders to ensure alignment to departmental needs and priorities Proactively establishes strategic direction, identifies key positions, analyzes talent, and develops, implements, and evaluates succession plans	Reviews all applicants and conducts a fair and equitable interview process to determine the best candidate for hire Identifies and secures resources for new hires to ensure workflow continuity Analyzes job descriptions, soliciting and incorporating input from relevant stakeholders to ensure alignment to departmental needs and priorities as needed Analyzes team talent and develops succession plans	Hires staff to fill vacant positions Provides opportunities for new hires to acquire resources needed for workflow continuity Reviews job descriptions as required, soliciting or incorporating input from some or few stakeholders Occasionally develops portions of succession plans but may not implement with fidelity	Struggles to prioritize applicant review or hiring Provides basic resources for new hires with limited consideration of workflow continuity Infrequently reviews job descriptions and rarely solicits input from relevant stakeholders Rarely plans for succession or evaluates team talent

PERFORMANCE RUBRIC

Domain 2: Developing Talent

Team members identify opportunities and take action to develop self, peers, teams, and departments.

LEADER OF
OTHERS

2.4: ENSURES HIGH PERFORMANCE OF DIRECT REPORTS

LEADER OF
TEAMS

PERFORMANCE DESCRIPTORS	Exemplary (4 Points)	Proficient (3 Points)	Progressing (2 Points)	Unsatisfactory (1 Point)
- Communicates realistic expectations for work performance - Encourages employees to seek out and participate in professional learning opportunities - Discusses progress and performance with direct reports to promote professional growth, providing continuous job-specific feedback and coaching - Develops skill set of direct reports by delegating meaningful and challenging tasks - Uses performance evaluation to fairly and accurately depict contributions to the work, holding each employee accountable for their part in achieving expected outcomes	Direct reports can clearly describe their role, how their work connects to the goals of the team, and what success looks like for their work and for the team Frequently assesses individual and team needs, offering and supporting recommendations of strategically aligned, high quality professional learning Checks in with all direct reports to effectively and efficiently move work projects forward and assigns tasks to significantly stretch team and individual capacity Habitually observes work of direct reports and frequently solicits updates; models and cultivates shared accountability and ownership for achieving outcomes	Direct reports can articulate their role and what success looks like for their work and for the team Regularly offers and supports recommendations for high quality professional learning for individuals and teams Consistently checks in with direct reports, helping to move work projects forward and may assign tasks to appropriately stretch individual capacity Observes work of direct reports and regularly solicits updates	Some direct reports can articulate their role or what success looks like for their work or for the team Sporadically offers or supports recommendations for professional learning Sometimes holds check-ins with direct reports to move work projects forward or occasionally assigns tasks with limited consideration of individual capacity Occasionally observes work of direct reports or sporadically solicits updates	Most direct reports struggle to articulate their role or what success looks like for their work or for the team Rarely offers or supports opportunities for professional learning Infrequently conducts check-ins with direct reports or assigns tasks with limited consideration of individual capacity Rarely observes the work of direct reports or rarely solicits updates

PERFORMANCE RUBRIC

Domain 2: Developing Talent

Team members identify opportunities and take action to develop self, peers, teams, and departments.

2.5: PROMOTES EFFECTIVE MANAGEMENT

LEADER OF
TEAMS

PERFORMANCE DESCRIPTORS	Exemplary (4 Points)	Proficient (3 Points)	Progressing (2 Points)	Unsatisfactory (1 Point)
- Holds managers accountable for coaching and developing employees - Offers insight and advice to managers - Delegates meaningful responsibilities and empowers managers to do the same - Strategically aligns funding to allocate resources in support of progression toward goals and employee development - Facilitates goal accomplishment through strategic staffing and assignment of work	Explicitly builds or improves systems to encourage and incorporate employees to assume leadership and decision-making roles Effectively collaborates with direct reports to achieve leadership goals, maximizing individual and team potential Provides individualized, intentional, and strategic job-embedded leadership feedback and coaching to all managers and direct reports that leads to improved outcomes Facilitates, initiates, plans, and engages in tailored leadership retreats, professional development, and team-building opportunities aligned to goals and team needs Proactively evaluates personnel allocations and assigns or reorganizes work to support the health and wellbeing of all team members and in pursuit of goal achievement	Implements systemic, equitable opportunities to employees to assume leadership and decision-making roles Collaborates with direct reports to achieve leadership goals, improving individual or team potential Provides job-embedded leadership feedback and coaching to all managers and direct reports Facilitates and engages in leadership retreats, professional development, or teambuilding opportunities intentionally aligned to goals and team needs Regularly evaluates personnel allocations and assigns or reorganizes work to support the health and wellbeing of team members	Provides some employees opportunities to assume leadership and decision-making roles Collaborates with direct reports to achieve leadership goals Provides leadership feedback and coaching when directed or requested or may not provide feedback to all managers and direct reports Offers leadership retreats, professional development, or teambuilding but may not align to goals or team needs Allocates personnel or assigns or reorganizes work to mitigate potential issues	Rarely allows employees opportunities to assume leadership and decision-making roles Collaborates with direct reports when necessary to make progress on leadership goals Gives limited leadership feedback or coaching to managers or direct reports Offers few leadership retreats, professional development, and/or teambuilding opportunities or relies on external offerings to develop employees Assigns personnel or reorganizes work in response to issues

PERFORMANCE RUBRIC

LEADER OF
SELF

Domain 3: Driving Impact

Team members impact the District with high levels of productivity.

LEADER OF
OTHERS

3.1: MANAGES TIME AND ORGANIZES TASKS FOR SUCCESS

LEADER OF
TEAMS

PERFORMANCE DESCRIPTORS	Exemplary (4 Points)	Proficient (3 Points)	Progressing (2 Points)	Unsatisfactory (1 Point)
- Plans ahead to maximize success - Tracks progress toward task completion and adjusts course as necessary - Achieves intended results - Prioritizes tasks appropriately - Completes work on time - Uses planning, time management, and organization of work to meet deadlines	Proactively and thoroughly plans ahead, assisting team in moving work forward and maximizing success Rigorously adheres to established working hours and proactively communicates schedule with all relevant team members Almost without exception, proactively prioritizes work to ensure deadlines are met and tasks are accomplished ahead of schedule Nearly always submits error-free and high quality final work products Habitually sets project benchmarks to track progress and keep project ahead of schedule; proactively readjusts workflow and/or communicates need for assistance	Consistently plans ahead to assist team in moving work forward Consistently adheres to established working hours and communicates schedule with relevant team members as expected Prioritizes work tasks to meet scheduled benchmarks and deadlines Consistently submits good quality final work products with only a few or minor adjustments needed Sets project benchmarks to track progress; readjusts workflow and communicates need for assistance in timely manner	Sporadically plans ahead to assist team in moving work forward Inconsistently adheres to established working hours or communicates schedule when reminded Adjusts work tasks as directed or some deadlines are missed Submits final work products but may contain errors or may not meet expected professional quality Sometimes sets project benchmarks to track progress; sometimes communicates need for assistance in a timely manner	Struggles to plan ahead or impedes team in moving work forward Rarely adheres to established working hours or communicates schedule as directed Struggles to prioritize work tasks resulting in missed deadlines Frequently submits final work products late, containing errors, or not of professional quality Rarely sets project benchmarks or fails to communicate need for assistance in timely manner

PERFORMANCE RUBRIC

LEADER OF
SELF

LEADER OF
OTHERS

LEADER OF
TEAMS

Domain 3: Driving Impact

Team members impact the District with high levels of productivity.

3.2: SOLVES PROBLEMS

PERFORMANCE DESCRIPTORS	Exemplary (4 Points)	Proficient (3 Points)	Progressing (2 Points)	Unsatisfactory (1 Point)
- Practices logical problem-solving techniques - Acknowledges and corrects mistakes in a timely manner - Seeks out information to help address issues - Informs manager/others of problems when appropriate	Habitually dissects and evaluates issues and problems in pursuit of a comprehensive understanding of contributing factors Nearly always reports or acknowledges errors when appropriate; proactively reflects, plans, tests, and documents procedures to limit recurrence of mistakes Almost without exception, proactively communicates issues; solicits input from all relevant stakeholders and incorporates feedback resulting in improved outcomes Considers a wide variety of solutions to a problem and nearly always selects the one that delivers effective results	Evaluates issues and problems in pursuit of a full understanding of contributing factors Reports or acknowledges errors when appropriate; reflects and plans to limit recurrence of mistakes Communicates issues and solicits input from all relevant stakeholders; incorporates feedback to help solve problems Considers a variety of solutions to a problem and usually selects one that delivers good results	Seeks answers to issues and problems but may not pursue a full understanding of contributing factors Sometimes reports or acknowledges errors or may not recognize which issues need to be reported; sporadically limits recurrence of mistakes At times, communicates issues without soliciting input from all relevant stakeholders or incorporates feedback that may or may not help solve problems Considers some solutions to a problem and sometimes selects one that delivers good results	Infrequently seeks answers to problems; rarely demonstrates the capacity or will to determine contributing factors Rarely reports or acknowledges errors or struggles to recognize which issues need to be reported; rarely limits recurrence of mistakes Rarely communicates issues with stakeholders for their input; rarely incorporates feedback Considers few solutions to a problem and struggles to select the appropriate solution

PERFORMANCE RUBRIC

LEADER OF
SELF

LEADER OF
OTHERS

LEADER OF
TEAMS

Domain 3: Driving Impact

Team members impact the District with high levels of productivity.

3.3: DEMONSTRATES MASTERY OF JOB-SPECIFIC SKILLS

PERFORMANCE DESCRIPTORS	Exemplary (4 Points)	Proficient (3 Points)	Progressing (2 Points)	Unsatisfactory (1 Point)
- Demonstrates mastery of tools and skills necessary to carry out the functions of the position - Executes technical job requirements	Almost without exception, demonstrates substantial ability to apply knowledge and use know-how to complete tasks and solve problems Habitually exceeds expectations on routine work tasks and is consistently a top performer Effectively performs the required concrete/technical skills specific to their position at mastery level; serves as a resource to the team	Demonstrates the ability to apply knowledge and use know-how to complete tasks and solve problems Consistently meets expectations on routine work tasks Consistently performs the concrete / technical skills specific to their position	Sometimes demonstrates the ability to apply knowledge and use know-how to complete tasks and solve problems Meets expectations on some routine work tasks or may require ongoing assistance Performs some of the concrete / technical skills specific to their position	Applies limited knowledge and know-how to complete tasks and solve problems Rarely meets expectations routine work tasks or may require ongoing or heavy intervention Struggles with performing the concrete / technical skills specific to their position

PERFORMANCE RUBRIC

Domain 3: Driving Impact

Team members impact the District with high levels of productivity.

LEADER OF
OTHERS

3.4: MANAGES PROJECTS

LEADER OF
TEAMS

PERFORMANCE DESCRIPTORS	Exemplary (4 Points)	Proficient (3 Points)	Progressing (2 Points)	Unsatisfactory (1 Point)
- Sets clear, measurable project goals - Delegates tasks appropriately and monitors goal progress - Achieves successful goal outcomes - Aligns time in relationship to task importance - Anticipates, eliminates, and adjusts for problems and unforeseen circumstances that may hinder goal accomplishment	Nearly always, implements aggressive, clear, and measurable project goals that scaffold into department, division, and District goals resulting in successful outcomes Strategically and proactively allocates and readjusts time of personal tasks and time of direct reports aligned to task importance for achieving optimal results Aggressively and proactively develops and executes detailed contingency plans in advance of potential or unforeseen circumstances	Implements clear and measurable project goals that scaffold into department, division, and District goals Allocates time of personal tasks and time of direct reports aligned to task importance Develops and executes contingency plans in advance of potential or unforeseen circumstances	Implements project goals that may not clearly scaffold into department, division, and District goals Occasionally allocates time of personal tasks and time of direct reports aligned to task importance Executes contingency plans as unforeseen circumstances arise	Implements unclear, difficult to measure, or not clearly scaffolded project goals Rarely allocates time of personal tasks and time of direct reports Struggles to execute contingency plans

PERFORMANCE RUBRIC

Domain 3: Driving Impact

Team members impact the District with high levels of productivity.

LEADER OF
OTHERS

3.5: DEVELOPS STRATEGIC AND DATA-DRIVEN GOALS

LEADER OF
TEAMS

PERFORMANCE DESCRIPTORS	Exemplary (4 Points)	Proficient (3 Points)	Progressing (2 Points)	Unsatisfactory (1 Point)
- Sets rigorous qualitative and quantitative departmental goals - Manages work to ensure employee efforts align to goals - Create systems for tracking progress toward goals by gathering and reporting data - Achieves intended results and encourages continuous improvement	Leads the analysis of relevant data to collaboratively develop rigorous department or team goals tightly aligned to District priorities and initiatives Proactively compares actual progress to planned milestones and adjusts plans and resources accordingly, holding self and others accountable for achieving or exceeding intended outcomes Establishes or maintains systems to strategically collect and use data, collaborating with team to track progress toward goals Leads team in regularly meeting or exceeding goals, setting increasingly aggressive targets as appropriate	Analyzes relevant data to collaboratively develop rigorous department or team goals aligned to District priorities and initiatives Compares actual progress to planned milestones and adjusts plans and resources accordingly, holding self and others accountable for achieving intended outcomes Uses data systems and collaborates with team to track progress toward goals Assists team in consistently meeting or exceeding goals; sets appropriate targets	Conducts some analysis of relevant data to develop department or team goals that may align to District priorities and initiatives Sporadically compares progress to planned milestones, sometimes adjusts plans or resources accordingly, or occasionally holds self and others accountable for outcomes Sometimes uses data and collaborates with team to track progress toward goals Team sometimes meets goals; sporadically sets acceptable targets	Conducts an incomplete analysis of data resulting in department or team goals that demonstrate loose alignment to District priorities or are limited to one year Rarely compares progress or takes ownership when milestones are not met; struggles to adjust plans or hold self or others accountable Rarely uses data or rarely collaborates with team to track progress toward goals Team rarely meets goals; rarely sets targets

PERFORMANCE RUBRIC

Domain 3: Driving Impact

Team members impact the District with high levels of productivity.

LEADER OF
OTHERS

3.6: FOCUSES ON INNOVATIVE AND STRATEGIC DECISION-MAKING

LEADER OF
TEAMS

PERFORMANCE DESCRIPTORS	Exemplary (4 Points)	Proficient (3 Points)	Progressing (2 Points)	Unsatisfactory (1 Point)
- Identifies key issues and relationships relevant to achieving short and long-term goals - Synthesizes information, resources, and possible constraints for success when developing an action plan for long range goals - Considers data, experience, and stakeholder input when making decisions - Stays abreast of current policies, best practices, and trends - Implements innovative and creative solutions	Nearly without exception, decisions are made in the best interest of the District and effectively advance department and District goals and priorities Develops, improves upon, and uses varied structures and protocols to solicit input from all or nearly all appropriate and relevant stakeholders Proactively seeks out multiple data sources and other resources in support of sound decision-making Demonstrates a strong commitment to innovation, creativity, and forward thinking when recommending and implementing solutions	Decisions are consistently made in the best interest of the District and advance department and District goals and priorities Uses structures and protocols to solicit input from a variety of appropriate and relevant stakeholders Uses data and other resources in support of sound decision-making Consistently demonstrates creativity and forward thinking when recommending solutions	Decisions are usually made in the best interest of the District; however, they may not advance the goals and priorities of the department and/or District Occasionally uses structures or protocols to solicit input from a variety of appropriate and relevant stakeholders Intermittently uses data and other resources in support of decision-making Demonstrates some creativity and forward thinking when recommending solutions	Some decisions are made with limited consideration of the best interest of District or department goals and priorities Rarely collects structured input or rarely solicits input from a variety of appropriate and relevant stakeholders Seldom uses data or other resources for informed decision-making Demonstrates a lack of creativity or forward thinking when recommending solutions

PERFORMANCE RUBRIC

Domain 3: Driving Impact

Team members impact the District with high levels of productivity.

3.7: ORGANIZES RESOURCES

LEADER OF
TEAMS

PERFORMANCE DESCRIPTORS	Exemplary (4 Points)	Proficient (3 Points)	Progressing (2 Points)	Unsatisfactory (1 Point)
- Leverages resources to accomplish goals - Establishes processes and systems to manage multiple teams and projects simultaneously - Ensures that work aligns to departmental and District goals - Manages budget requirements and resources to meet goals	Habitually evaluates and proactively seeks out resources to support accomplishment of team goals Proactively designs and implements structures and processes that improve or ensure high levels of productivity across the team Deliberately and effectively allocates resources tightly aligned to department and District goals in a manner that equitably contributes to successful outcomes for all teams Strategically and efficiently leverages funds in alignment with state and federal guidelines, exceeding department goals	Evaluates and secures resources to support accomplishment of team goals Implements structures and processes that facilitate productivity across the team Allocates resources aligned to department and District goals in a manner that equitably ensures successful outcomes for teams Effectively leverages funds in alignment with state and federal guidelines, achieving department goals	Occasionally evaluates and secures resources to support accomplishment of team goals Implements some structures and processes that enable productivity across the team Allocates some resources aligned to department and District goals in a manner that supports success for most teams Leverages funds in compliance with state and federal guidelines, accomplishing most department goals	Rarely evaluates or secures resources to support accomplishment of team goals Rarely implements structures and processes that enable productivity across the team Rarely allocates resources aligned to department and District goals resulting in limited team success Rarely leverages funds in compliance with state and federal guidelines or accomplishes few department goals

PERFORMANCE RUBRIC

LEADER OF
SELF

Domain 4: Engaging Stakeholders

Team members communicate in ways that build trust, develop positive relationships, and promote equity.

LEADER OF
OTHERS

4.1: COMMUNICATES PROFESSIONALLY AND EFFECTIVELY

LEADER OF
TEAMS

PERFORMANCE DESCRIPTORS	Exemplary (4 Points)	Proficient (3 Points)	Progressing (2 Points)	Unsatisfactory (1 Point)
- Communicates with various audiences, sharing information and ideas in appropriate settings and formats - Conveys information to ensure messages are understood by the target audience in both formal and informal situations - Communications are accurate and organized - Exercises diplomacy in communication	Establishes, improves, and maintains effective two-way communication systems that promote accountability with all or nearly all relevant stakeholders, ensuring frequent input and feedback Written and verbal communication is nearly always clear and concise; uses correct grammar and vocabulary Model for planning and adapting style and tone to match needs of the audience while maintaining integrity of the message	Maintains two-way communication channels that address accountability with most stakeholders, allowing input and feedback Written and verbal communication is clear and concise; uses correct grammar and vocabulary Consistently uses appropriate style and tone for the message and the audience	Maintains one or two-way communication channels that address accountability with some stakeholders, allowing for intermittent input or feedback from some Written and verbal communication is usually clear; uses correct grammar and vocabulary Sometimes uses appropriate style and tone for the message and the audience	Maintains limited communication channels that address accountability with stakeholders, allowing for rare input and feedback; implementation is incomplete or ineffective Written and verbal communication may not be clear or grammatically correct Rarely varies or adapts tone to the audience

Domain 4: Engaging Stakeholders

Team members communicate in ways that build trust, develop positive relationships, and promote equity.

4.2: BUILDS POSITIVE RELATIONSHIPS WITH INTERNAL AND EXTERNAL STAKEHOLDERS

PERFORMANCE DESCRIPTORS	Exemplary (4 Points)	Proficient (3 Points)	Progressing (2 Points)	Unsatisfactory (1 Point)
- Demonstrates ability to work cooperatively with others - Facilitates an open exchange of ideas and requests feedback when appropriate - Demonstrates a commitment to the Core 4 principles of customer service - Fast - Friendly - Flexible - Focused	Almost without exception, interactions are thoughtful and considerate of the feelings and perceptions of others Listens and responds to inquiries (personal, email and phone) in a timely and appropriate manner; proactively and systematically requests and incorporates feedback to improve and sustain a positive culture Nearly always offers an exemplary level of fast, friendly, flexible, and focused customer service to internal and external stakeholders; is a model for others to follow	Interactions are thoughtful and considerate of the feelings and perceptions of others Listens and responds to inquiries (personal, email and phone) in a timely and appropriate manner; requests feedback to improve culture Consistently offers fast, friendly, flexible, and focused customer service to internal and external stakeholders	Interactions are sporadically thoughtful and considerate of the feelings and perceptions of others Sometimes listens and responds to inquiries (personal, email and phone) in a timely and appropriate manner or sporadically requests feedback Offers fast, friendly, flexible, and focused customer service to most internal and external stakeholders	Interactions demonstrate a lack of consideration for the feelings and perceptions of others Rarely listens and responds to inquiries in a timely and appropriate manner or rarely requests feedback Offers fast, friendly, flexible, and focused customer service to a limited number of internal and external stakeholders

PERFORMANCE RUBRIC

Domain 4: Engaging Stakeholders

Team members communicate in ways that build trust, develop positive relationships, and promote equity.

LEADER OF
OTHERS

4.3: BUILDS HIGH-PERFORMING TEAMS

LEADER OF
TEAMS

PERFORMANCE DESCRIPTORS	Exemplary (4 Points)	Proficient (3 Points)	Progressing (2 Points)	Unsatisfactory (1 Point)
- Uses appropriate methods and a flexible interpersonal style to build a cohesive team - Leverages the capabilities, insights, and ideas of individuals with diverse ability, work style, and perspective - Provides timely and relevant information teams need to support work streams - Builds morale by promoting an atmosphere of trust, support, positivity, and ultimately job satisfaction - Explicitly recognizes team members' contributions	Intentionally and systematically builds systems of practice that maximize productive teamwork Maximizes each direct report's contributions to the team by aligning individual strengths to work assignments Engages in clear, ongoing communication of progress toward achieving goals, leveraging methods aligned to team members' needs; proactively shares timelines with relevant team members Habitually and deliberately provides direct reports with autonomy, resources, and support Establishes or improves systems to regularly identify and reward individual and team successes	Builds systems of practice that facilitate teamwork Learns and matches individual strengths to work assignments Communicates progress toward achieving goals using various methods; shares timelines with team Provides direct reports with appropriate autonomy, resources, and support Engages in opportunities to recognize and reward individual and team successes	Sometimes builds systems of practice that support teamwork Sometimes assigns work based on strengths and weaknesses of team members Sporadically communicates progress toward achieving goals or sporadically shares timelines with team Sporadically provides direct reports with appropriate autonomy, resources, and support Sporadically recognizes and rewards individual and team successes	Rarely or fails to build systems of practice that support teamwork Assigns work with limited concern for team members' strengths and weaknesses Infrequently communicates progress or timelines toward achieving goals with team Rarely provides direct reports with autonomy, resources, or support Rarely recognizes or rewards individual and team successes

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Domain 4: Engaging Stakeholders

Team members communicate in ways that build trust, develop positive relationships, and promote equity.

4.4: LEVERAGES CROSS-DEPARTMENTAL COLLABORATION

LEADER OF
TEAMS

PERFORMANCE DESCRIPTORS	Exemplary (4 Points)	Proficient (3 Points)	Progressing (2 Points)	Unsatisfactory (1 Point)
- Builds collaborative interdepartmental relationships - Creates appropriate opportunities for cross-department transfer of information - Works with other departments to simplify processes, maximize resources, and improve outcomes	Proactively and deliberately seeks collaboration with internal and external stakeholders to achieve team and departmental priorities, with evidence of improved outcomes Develops and implements effective systems to gather and share data in support of team goals while implementing data-driven decisions	Intentionally shares work and ideas with internal and external stakeholders to advance the goals of the team and department Uses systems to gather and share data in support of team goals and implementing data-driven decisions	Shares work and ideas with internal and external stakeholders through collaboration; however, contributions have limited impact Occasionally uses systems to gather and share data in support of team goals and make data-driven decisions	Meets with some internal and external stakeholders but rarely or does not share ideas or resources beyond the team or department Rarely uses systems to gather or share data or struggles to make data-driven decisions

APPRAISAL PROCESS

The appraisal process is accomplished through three conferences during the annual appraisal period:

- ❖ Planning/goal setting conference
- ❖ Mid-year review conference
- ❖ End of year review conference

Performance tasks include both team member and appraiser action and acknowledgment. All team members have access to their appraisal documents electronically, will participate in performance conferences with their appraiser, and can respond to the appraisal results. All District employees shall be annually appraised. The District's employee appraisal system shall be administered consistent with the general principles set out below. The District shall develop appraisal manuals and regulations that include detailed criteria on how this policy is implemented, including time lines, appraisal procedures, and compliance forms, to be approved by the Superintendent of Schools or designee. [See also DNA(LOCAL) and DNB(LOCAL)] <https://pol.tasb.org/PolicyOnline/PolicyDetails?key=361&code=DN#localTabContent>

BEGINNING OF YEAR PLANNING/GOAL SETTING CONFERENCE

In preparation for the planning/goal setting conference, all team members should develop and submit approximately three job-specific goals which they will work toward achieving throughout the appraisal cycle. During the planning/goal setting conference, appraisers must ensure that team members understand their job roles and responsibilities, goals, priorities, and expected professional standards of conduct.

During this planning/goal setting conference, appraisers are also expected to ensure that their team members' goals are aligned with the goals of their department and the district, whenever possible. This planning activity is critical for the success of the campuses, departments, and the district. When this activity is well executed by all appraisers and team members, team members can focus their time and resources in meeting strategically aligned priorities.

INDIVIDUAL WORK-SPECIFIC GOAL SETTING

Goals are the core job functions or projects that appraisers hold team members accountable for annually. During the fall Planning/Goal Setting Conference, team members, and evaluators conference to formally discuss these individual goals.

Each team member evaluated on the Career Management System is required to have 3 job-specific, measurable goals entered in the system. Goals should be rigorous yet attainable to challenge team members while aligning their work to the team, division, or District. Goals should meet the **SMART** goal criteria and must be entered online in Cornerstone. Resources on goal development can be found online at the Career Management System website: <https://dallasisd.org/careermanagement>.

MID-YEAR REVIEW CONFERENCE

During the Mid-year review conference each team member completes a self-review, and the appraiser meets in person with each team member to assess areas of strength and growth. In addition, the appraiser will review, revise, and realign the team member's goals with the needs and the goals of the district, their department, and campus. Team members should be prepared to present evidence supporting their work performance for the mid-year conference. If necessary, an intervention plan will be developed to address levels of performance that are not meeting expectations.

The mid-year conference includes the following activities:

- ❖ A discussion and review of team member's performance
- ❖ Review of performance components where team member's and appraiser's perception of work performance or goal progress are not aligned
- ❖ Review, revision, and realignment of the team member's goals with the needs and goals of the district, department, or campus
- ❖ Development of an Individual Improvement Plan if team member's performance requires improvement*

***Note:** If a team member's work performance requires improvement, appraisers should conduct additional meetings between the Mid-year conference and End of year conference and should not wait until the End of year review conference to develop an Individual Improvement Plan.

END OF YEAR REVIEW CONFERENCE

The End of year review conference requires that appraisers:

- ❖ Review the team member's success in meeting their individual goals and expected work behaviors
- ❖ Provide team members with their ratings on performance rubric indicators and individual goals
- ❖ Review performance components for areas of improvement and commendation

PERFORMANCE DOCUMENTATION

Appraisers will collect information and evidence to support performance and goal ratings throughout the appraisal cycle. Documentation indicating the appraiser's rationale for ratings of is strongly recommended in the End of year evaluation, particularly for **1-Unsatisfactory** and **4-Exemplary**.

Team members may be asked to prepare and present evidence supporting their performance. This supporting documentation may include information such as attendance records, action plans, and completed products and documentation of services (reports/data, report numbers/metrics, memos, meeting agendas and/or minutes, customer satisfaction survey results, or records of services). Evidence should be organized by relevant performance indicators or individual work-specific goals.

INDIVIDUAL INTERVENTION PLAN

An appraiser must develop an Individual Intervention Plan for a team member whose performance has been deemed in need of improvement. The appraiser may develop an Individual Intervention Plan at any time during the annual appraisal cycle to call attention to performance components requiring improvement.

The Individual Intervention Plan template is available on the CMS website, and appropriate documentation and evidence for need should be included.

As a best practice, an Individual Intervention Plan should be developed in collaboration with their team members. In all cases, appraisers and the team member must meet and review the Individual Intervention Plan. The Individual Intervention Plan must be implemented and completed during the scheduled workdays and within the annual appraisal year.

The Individual Intervention Plan consists of the following:

- ❖ Performance component(s) in which the team member requires improvement
- ❖ Specific activities and tasks designed to improve performance (including dates for completion)
- ❖ Evidence to determine that performance improvement activities and tasks have been completed and/or
- ❖ Directives for needed changes in team member behavior and timelines for accomplishing change
- ❖ Evidence to determine if team member performance or behavior has changed

***Note:** Appraisers will provide team members with corrective feedback on existing intervention plans and discuss intervention plans for the subsequent appraisal period if necessary.

Please contact the Employee Relations team for additional information or clarification.

EXTENUATING CIRCUMSTANCES

Extenuating circumstances may prevent appraisers from providing an End of year appraisal. These circumstances include the following:

- ❖ The team member was hired or transferred into the current position on or after April 1st
- ❖ The team member has not been in attendance due to an approved leave (for additional guidance or clarification, contact the HCM Performance Management team)

Appraisers who cannot rate performance due to extenuating circumstances should use the “N/A” rating option for all indicators and submit with comments providing context.

SCORING PERFORMANCE RUBRIC COMPETENCIES

When evaluating performance, Performance Rubric competencies will be scored using the following 1-4 scale during the End of year Appraisal:

EXEMPLARY: Impact & Outcomes

The exemplary team member is considered a role model that consistently exhibits exceptional performance translating to high levels of achievement of department and/or team goals. They show evidence of in-depth expertise along with superior ability to implement and integrate ALL essential functions of the position. Their work and interactions are always culturally appropriate, focused on providing unparalleled customer service, and branded with high expectations for themselves and their team. The exemplary team member's impact is not limited to their team but is department and/or districtwide. They possess a growth mindset that facilitates productive collaboration and compelling mentorship of colleagues. They are highly motivated, showing initiative and requiring minimal supervision to move their work forward. Team members performing at this level are uniquely creative, innovative, or positively influential. They are considered “irreplaceable.”

PROFICIENT: Consistent; Meets Expectations

The proficient team member is a valued team member who demonstrates consistent favorable performance that translates to the team meeting most performance goals. There is evidence of substantial expertise along with implementation and integration of the essential functions of the position. Proficient team members participate in professional learning opportunities and are supportive of colleagues. This rating refers to a successful, professional team member that is consistently culturally responsive and customer service focused while maintaining high expectations for themselves. It is the expectation that most team members are consistently performing at a proficient level while simultaneously engaging in further development.

PROGRESSING: Inconsistent

The progressing team member displays sporadic shifts in effectiveness. There is evidence of basic knowledge and skills needed for the position, but more consistent overall performance is required. They are cordial with colleagues, but collaboration and/or professional learning is occasional and typically initiated via mandates. This rating refers to team members who are occasionally culturally responsive and customer focused, and they uphold some expectations for themselves. This level of performance indicates that the team member's work product is inconsistent and often ineffective, thus opportunities for improvement are warranted.

UNSATISFACTORY: Harming; Hindering

The unsatisfactory team member is considered ineffective. The team member shows little or no expertise and minimal initiative to achieve personal and/or team goals. The team member does not meet minimum performance standards and needs substantial improvement. This rating refers to work that is rarely culturally appropriate or customer focused. This level of performance is hindering the team member from achieving required goals or is harming the team and/or department from reaching collective goals. Significant intervention is required.

SCORING INDIVIDUAL GOAL ACCOMPLISHMENT

When evaluating individual work-specific goals, they will be scored using a 1-4 scale as prescribed on the following Individual Goals rubric during the End of year Appraisal:

 CMS Individual Goals Rubric 				
Essential Skills & Actions	EXEMPLARY (4 POINTS)	PROFICIENT (3 POINTS)	PROGRESSING (2 POINTS)	UNSATISFACTORY (1 POINT)
Employee partners with supervisor to develop three (3) goals guided by the SMART formula: • Specific • Measurable • Actionable • Relevant • Timely Goals reflect the employee's primary work responsibilities Baseline data is clearly defined with the identified direction/data element Goal progress is monitored throughout the appraisal cycle Goal statements are aligned to outcomes that demonstrate individual goals are tied to the success of the team or division	Goal Setting • Established a goal and detailed action plan tightly aligned to the success of the team or division • Goal statement included all five SMART elements with associated action plan and/or benchmarks • Baseline data was clearly defined and linked to outcome	Goal Setting • Established a goal and action plan aligned to team or division goals • Goal statement included the five SMART elements • Baseline data was linked to outcome	Goal Setting • Established a goal but may lack alignment, depth, or clarity • Goal statement lacked one or more SMART elements • Little or unclear baseline data	Goal Setting • Did not establish a goal or goal duplicates descriptors in the CMS Performance Rubric • No goal statements • No baseline data
	Goal Accomplishment • Goal substantially exceeded target • Thoroughly documented actions that show a clear progression toward goal accomplishment • Results reflect substantial, measurable outcomes for the team, department, or division	Goal Accomplishment • Goal met target • Documented actions that led to goal accomplishment • Results reflect some measurable outcomes for the team, department, or division	Goal Accomplishment • Progress made, but goal target was not met • Some documented actions or unclear action plan toward goal accomplishment • Results not clearly linked to goal	Goal Accomplishment • Limited or no progress toward goal accomplishment • Few or no documented actions • Few or no results reported

OVERALL EVALUATION SCORING

The annual evaluation score is the sum of points earned from the appraiser's evaluation of the team member's performance and goals during the applicable appraisal cycle. Scores from the performance indicators comprise 75% and goals comprise the remaining 25% of the overall evaluation rating.

- ❖ Performance rubric indicator scores are averaged and weighted 75%
- ❖ Goal scores are averaged and weighted 25%
- ❖ Performance and goals weighted scores are combined to determine the overall evaluation score and categorized according to the ranges below.

OVERALL EVALUATION RATING	SCORE RANGE
Exemplary	3.7 - 4.0
Exceeds Expectations	3.3 - 3.6
Proficient	2.6 - 3.2
Progressing	2.0 - 2.5
Unsatisfactory	0 - 1.9

WHAT IF I DISAGREE WITH MY APPRAISAL?

Team members are encouraged to discuss their concerns and grievances with their immediate appraiser, principal, or other appropriate administrator. When informal discussions fail to resolve the concern or dispute, the team member may file a grievance with the Employee Relations Department. See DGBA at <http://pol.tasb.org/Policy/Code/361?filter=DGBA>.

A grievance form must be filed no later than fifteen (15) business days from the date the team member first knew or, with reasonable diligence, should have known of the decision or action giving rise to the grievance or complaint. Please contact the Employee Relations team for additional information or clarification.

CONTACT

Human Capital Management
Performance Management Team
Email: careermanagement@dallasisd.org
Phone: (972) 749-5712

APPENDIX