



ADMINISTRATIVE PROCEDURE

SAN DIEGO UNIFIED SCHOOL DISTRICT

NO: 7745

PAGE: 1 OF 5

CATEGORY: **Personnel, Management/Supervisory Staff**

EFFECTIVE: **1-01-74**

SUBJECT: **Evaluation of Management Employees**

REVISED: **3-20-06**

A. PURPOSE AND SCOPE

1. To outline administrative procedures governing evaluation of certificated and classified employees compensated on the Management Salary Schedule.
2. **Related Procedures:**
 - Evaluation of regular contract certificated personnel (nonmanagement) 7355
 - Evaluation of visiting teachers and hourly certificated personnel 7360
 - Evaluation of classified Staff 7520
 - Evaluation of classified temporary employees 7525

B. LEGAL AND POLICY BASIS

1. **Reference:** Board policy: I-7001, I-7151, I-8500, I-8501, I-8750; Education Code Sections 44660-44663; School Site Management Performance Evaluation Report.

C. GENERAL

1. **Originating Office.** Suggestions or questions concerning this procedure should be directed to the Human Resource Services Division, Office of the Chief of Staff.
2. **Purposes of Evaluation.** Personnel evaluation procedures of the district are intended to identify, reinforce, and improve (as needed) skills, behaviors, and abilities that result in achievement of district and/or division goals and objectives. Evaluation plan shall:
 - a. Establish a procedure by which long-range goals of the district can be translated into goals for effective performance for individual management employees.
 - b. Involve all management employees in mutual planning of defined goals, objectives, and standards; encourage management employees to integrate their own professional goals and objectives with those of the school district by means of such mutual planning; encourage innovative and productive practices for achieving objectives.
 - c. Establish a performance evaluation plan in which standards or results by which individual accomplishment shall be assessed are determined prior to evaluation.

- d. Provide a procedure for evaluation of management employees who are *certificated instructional* personnel that will be similar to the procedure for nonmanagement certificated instructional personnel, as set forth in Education Code Sections 44660-44663.
- e. Provide a procedure for:
 - (1) Identifying and commending effective performance.
 - (2) Counseling and assisting management employees to improve performance.
 - (3) Appropriately documenting the basis for promotion, transfer, demotion, suspension, or dismissal.

3. **Definitions**

- a. **Management employee:** An employee designated by the Board of Education as having significant responsibilities for formulating district policies or administering district programs and who is compensated on a management salary plan.
- b. **Performance evaluations :** A system of evaluation that focuses on achievement of performance expectations and specifies means by which their accomplishment can be known. This system places mutual responsibility on evaluator and evaluatee for establishing performance expectations based upon position responsibilities or organizational goals and expectations, and appraising progress toward them. To be effective, this system requires a clear identification of objectives or desired results, establishment of a realistic program for their achievement, and an evaluation of performance in terms of results achieved.
- c. **Performance expectation:** A statement of a desired or needed result.
- d. **Qualitative assessment techniques:** Measurement of achievement by the judgment of one or more specified evaluators or resource persons.
- e. **Quantitative assessment techniques:** Measurement of achievement of a performance expectation by setting specific numerical or other quantitative measures.
- f. **Evaluator:** Supervisor of person whose performance is being evaluated.

- g. **Evaluatee:** Individual whose performance is being evaluated.
- h. **Constraint:** A condition that hinders achievement of performance expectation(s).

4. **General Policies**

- a. Performance evaluation of management employees will be based on the following components:
 - (1) Duties and responsibilities as defined in the evaluatee's job description
 - (2) Performance expectations
- b. **Scheduling.** Performance of each management employee shall be evaluated annually, following a procedure that will be fair and equitable to the employee and will ensure accountability for accomplishment of district goals and objectives.
- c. **Certificated management employees (principals/vice principals/site administrators).** In evaluation of certificated instructional management personnel, the following factors shall be considered per School Site Management Performance Evaluation Report (Attachment 4):
 - (1) Instructional leadership
 - (2) Operational leadership
 - (3) Organizing and working with parent and community members
- d. **Classified and certificated non-site employees.** In the evaluation of classified and certificated non-site management personnel, competency of each employee shall be assessed as it reasonably relates to fulfillment of assigned job responsibilities.
- e. **Performance expectations.** In the evaluation of all classified and non-site management personnel, performance expectation shall be considered in relation to areas where performance is strongest, where performance can be strengthened, and performance of assigned job responsibilities.

f. **Forms used**

- (1) School Site Management Performance Evaluation Report
- (2) Criteria for Senior Management Evaluations
- (3) Criteria for Executive Evaluation
- (4) Guidelines for the Evaluation of Certificated and Classified Central Office Management Staff

g. **Process.** Management evaluations shall be recorded in writing on prescribed form. Evaluation report must be signed by evaluator and evaluatee, and reviewed by evaluator's supervisor.

- (1) A copy of the evaluation report shall be discussed with and given to the employee per timelines detailed in the appropriate evaluation document referenced in C.4.f.
- (2) Evaluatee shall have the right to initiate a written response to the report; evaluatee's response becomes a permanent part of the evaluatee's personnel file.
- (4) Original of the evaluation report shall be placed in employee's file in the Human Resource Services Division.

D. IMPLEMENTATION

1. **Human Resource Services Division** notifies all division/branch heads each year before September 1 that all management employees must be evaluated during that school year.
2. **Division/branch heads** distribute evaluation forms to appropriate evaluators.
3. **Evaluator** proceeds with the evaluation in accordance with guidelines outlined in the appropriate evaluation document referenced in C.4.f.

E. FORMS AND AUXILIARY REFERENCES

1. Criteria for Senior Management Evaluation, Attachment 1

SUBJECT: **Evaluation of Management Employees**

NO: **7745**

PAGE: **5 OF 5**

EFFECTIVE: **1-01-74**

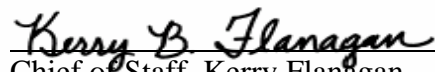
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2. Criteria for Executive Evaluation, Attachment 2
3. Site Leadership Performance Evaluation Time Lines, Attachment 3
4. School Site Management Performance Evaluation Report, Attachment 4

F. REPORTS AND RECORDS

1. Management Evaluation Report: Original retained permanently in employee's personnel file; evaluator's copy retained in school or department files for period during which evaluator and evaluatee are associated.

G. APPROVED BY



Chief of Staff, Kerry Flanagan
For the Superintendent of Schools