

*Educational Specialist Performance
Evaluation Handbook*



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PART I

PROCESS INTRODUCTION

Bedford County Public Schools' supervision of school-based educational specialists* incorporates a process for collecting and presenting data to document performance that is based on well-defined job expectations.

The Bedford County Public Schools' educational specialist evaluation system provides a balance between structure and flexibility. That is, it is prescriptive in that it defines common purposes and expectations, thereby guiding effective practice. At the same time, it provides flexibility, thereby allowing for creativity and individual 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.

The primary purposes of the evaluation system are to:

- ◆ improve the quality of instruction and/or service delivery by ensuring accountability for employee performance
- ◆ contribute to successful achievement of the goals and objectives defined in the vision, mission, and goals of the Bedford County Public Schools
- ◆ provide a basis for professional improvement through productive educational specialist appraisal and professional growth
- ◆ share responsibility for evaluation between the educational specialist and the evaluator in a collaborative process that promotes self-growth, instructional and/or service delivery effectiveness, and improvement of overall job performance

PURPOSES

This evaluation system includes the following distinguishing characteristics:

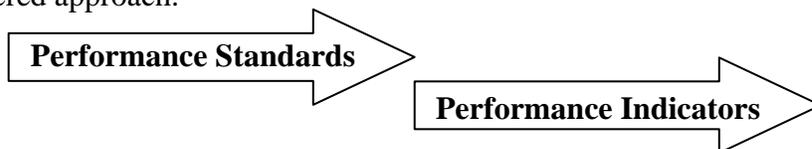
- ◆ benchmark behaviors for each of the performance standards
- ◆ a focus on the relationship between educational specialist performance and improved student academic achievement and/or service delivery
- ◆ a system for documenting educational specialist performance based on multiple data sources
- ◆ a procedure for conducting performance reviews that stresses accountability, promotes professional improvement, and increases educational specialist involvement in the evaluation process
- ◆ a support system for providing assistance when needed

* Educational Specialists include, but are not limited to: Guidance Counselors, Instructional Technology Resource Teacher (ITRT), Library/Media Specialists, Occupational Therapists, Physical Therapists, School Psychologists, School Social Workers, and Speech/Language Pathologist.

IDENTIFYING EDUCATIONAL SPECIALIST PERFORMANCE STANDARDS

Clearly defined professional responsibilities for educational specialists constitute the foundation for the educational specialist evaluation system. A fair and comprehensive evaluation system provides sufficient detail and accuracy so that both evaluatees (educational specialists) and evaluators (e.g. principal at the employee's base school or department supervisor) will reasonably understand the job expectations. In the unique situation in which an educational specialist supervises another educational specialist (i.e., OT supervising COTA and the PT supervising LPTA) then an evaluation team approach is used consisting of the supervising educational specialist and principal.

The expectations for educational specialist performance are defined using a two-tiered approach.



Performance standards refer to the major duties performed by an educational specialist. For all educational specialists, there are seven performance standards.

PERFORMANCE STANDARDS

Performance Standard 1: Knowledge of the Learning Community

The educational specialist identifies and addresses the needs of the target learning community by demonstrating respect for individual differences and understanding of cultures, backgrounds, and learning styles.

Performance Standard 2: Program Planning and Management

The educational specialist plans, implements, and manages programs and/or services to meet the diverse needs of all learners.

Performance Standard 3: Program Services and Support

The educational specialist uses knowledge of subject/content/field/technology to implement services and support for the targeted learning community consistent with established standards and guidelines.

Performance Standard 4: Assessment

The educational specialist gathers, analyzes and uses data to measure student or program progress, guide instruction, and provide timely feedback to students, families, and staff.

Performance Standard 5: Communication

The educational specialist communicates effectively with students, parents/guardians, and the community.

Performance Standard 6: Professionalism

The educational specialist maintains a professional demeanor, participates in professional growth opportunities, demonstrates an understanding of the program, and contributes to the profession.

Performance Standard 7: Student/Program Progress

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

A set of performance indicators has been developed (see Part III) to provide examples of observable, tangible behaviors. 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, and is not intended to be prescriptive. Further, all educational specialists are not expected to demonstrate each performance indicator.

PERFORMANCE INDICATORS

Both evaluators and educational specialists should consult the sample performance indicators for clarification of what constitutes a specific performance standard. As an illustration, performance indicators for the Program Planning and Management performance standard are listed in the box.

<p>Performance Standard 2: Program Planning and Management The educational specialist plans, implements, and manages programs and/or services to meet the diverse needs of all learners.</p> <p>Sample Performance Indicators:</p> <ul style="list-style-type: none"> • Understands and follows applicable local, state & federal regulations, policies, guidelines and procedures. • Demonstrates current knowledge of field/subject/content matter. • Provides a safe environment for interactions. • Organizes and maintains appropriate program records. • Demonstrates effective scheduling and time management skills. • Identifies and manages available resources to address learner needs.
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The performance indicators are provided to help educational specialists and their evaluators clarify job expectations. As mentioned, all performance indicators may not be applicable to a particular educational specialist position. *Ratings are NOT made at the performance indicator level but at the performance standard level.*

DOCUMENTING PERFORMANCE

A fair and equitable performance evaluation system for the role of an educational specialist 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. Three perspectives on an educational specialist’s work are used in the supervision process: the educational specialist’s, stakeholders’, and the evaluator’s. The sources of information briefly described in Table 1 were selected as means of providing accurate feedback on educational specialist performance.

Table 1: Data Sources for Educational Specialists

Data Source	Definition
Goal Setting	Educational specialists have a definite impact on student learning and progress. Educational specialists may also support the work of other professionals such as teachers and administrators. Depending on position assignment, grade level, content area, and students’ ability level, appropriate measures of student performance/program progress are identified to provide information on the learning gains of students or program enhancement. Educational specialists set goals for improving student/program progress based on the results of performance measures. The goals and the goal fulfillment constitute an important data source for evaluation.
Observations	Formal observations focus directly on the seven educational specialist performance standards. Depending on employee contract status, either an evaluator or a like-position peer conducts the observation. Workplace observations may include review of educational specialist’s products or artifacts.
Documentation Log	The documentation log includes specific artifacts that provide evidence of several of the performance standards.
Client Surveys & Summary Report	Stakeholder surveys provide information about stakeholders’ perceptions of how the professional is performing. The actual survey responses are seen <i>only</i> by the educational specialist. The educational specialist prepares a survey summary for discussion with the evaluator(s) (e.g., Principal).

Each educational specialist sets annual goals for improving student achievement/program progress. The base school principal and/or supervisor and the educational specialist look at the available data from student and/or program measures to inform the goal-setting process. A form is provided in Part II (*Educational Specialist Annual Goals for Improving Student Achievement/Program Progress*) for developing and assessing the annual goal(s). Educational specialists are to establish a minimum of one to a maximum of three goals relating to their instructional setting. Sample data sources include:

GOAL SETTING

- ◆ commercial criterion-referenced tests,
- ◆ educational specialist developed criterion-referenced pre- and post-tests,
- ◆ norm-referenced tests,
- ◆ standardized achievement tests,
- ◆ district interim assessments,
- ◆ program measures (see Table 2)
- ◆ schoolwide reviews of test data, attendance data, etc. and
- ◆ authentic measures (e.g., learner portfolio, recitation).

Table 2: Sample Data Sources by Educational Specialist Position

SUPPORT SERVICES	POSSIBLE MEASURES	
Guidance counselors	District-wide criterion and norm referenced tests, if applicable	Student attendance Number of discipline referrals Drop out rates Graduation rates Program progress measures
Library/media specialists	District-wide criterion and norm referenced tests, if applicable	Circulation statistics Other measures of performance and program progress, e.g., Accelerated Reader Program progress
Occupational therapists	Industry assessments District-wide criterion and norm referenced tests, if applicable	Program progress measures Therapy logs
Physical therapists	Industry assessments District-wide criterion and norm referenced tests, if applicable	Program progress measures Therapy logs
School psychologists	District-wide criterion and norm referenced tests, if applicable	Student attendance Number of discipline referrals Benchmarking (Language Arts) IEPs Program progress measures SCT Documentation SPED Annual Plan
Social workers	District-wide criterion and norm referenced tests, if applicable	Student attendance Number of discipline referrals Drop out rates Graduation rates
Speech/language pathologists	Industry assessments District-wide criterion and norm referenced tests, if applicable	Program progress measures

Developing Goals

Goals are developed early in the school year. The goals describe observable behavior and/or measurable results that would occur when a goal is achieved. The

acronym SMART is a useful way to self-assess a goal's feasibility and worth. SMART stands for:

- | | |
|---------------------|--|
| Specific | the goal is focused; for example, by content area, by learners' needs |
| Measurable | an appropriate instrument/measure is selected to assess the goal |
| Attainable | the goal is within the educational specialist's control to effect change |
| Realistic | the goal is appropriate for the school |
| Time limited | the goal is contained to a single school year |

Submission of the Goal Setting for Learner/Program Progress Form

Professionals complete a draft of their goal and schedule a meeting with their school base administrator to look at the available data from performance measures (see Table 2 for examples) and discuss the proposed goal. Each year professionals are responsible for submitting their goals to their administrators by the date of the first Friday in October.

End-of-Year Review of Goal

If the educational specialist is in a summative evaluation year (probationary contract and continuing contract employees in Year 3 of the three year cycle), the end-of-year review of the goal is included in the *Documentation Log* (discussed later in this section) and submitted to the evaluator by the first Friday in May. Each professional is responsible for assessing professional growth on the goal and submitting documentation to his/her administrator. By mutual agreement, administrators and individual professionals may extend the due date for the end-of-year review.

For continuing contract employees in Year 1 and Year 2 of the cycle, the goal and associated data is due by the first Friday in June to the evaluator (see page 14 for further information on the continuing contract three year cycle).

Observations are intended to provide information on a wider variety of contributions made by educational specialists in their workplace setting or to the school community as a whole. Evaluators 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. In order to provide targeted feedback on educational specialists' work relating to the

OBSERVATIONS

seven performance standards, observations using the *Observation* form (see Part II) are conducted. All formal observations last 30 minutes (minimum) and are followed by a post-observation dialogue within 15 working days. Given the complexity of the work that educational specialists perform, it is unlikely that all seven performance standards would be observed in a single session. Evaluators should focus on three performance standards (i.e., knowledge of the learning community, planning and program management, program services and support) during the observation and discuss the other standards during the post-conference.

A two-pronged approach is used in educational specialist evaluation based on contract status. The same forms are used regardless of the approach used. Table 3 on the next page shows the minimum number of yearly observations.

- For probationary contract employees and continuing contract employees in Year 3 of the evaluation cycle, the evaluator conducts the observations. The evaluator has the discretion to coordinate observations with other administrative staff. The other administrators are responsible for conducting the observation and post-conference and providing the signed documentation to the evaluator within 15 days of the observation occurring. At the evaluator's discretion or the employee's request a like-position peer may participate in the observation to provide targeted feedback. Employees on plans of improvement are observed using this approach.
- For continuing contract employees in Year 1 or Year 2 of the evaluation cycle, employees recommend to their evaluators another educational specialist in the same position or in a like-position who is also on a continuing contract to observe them. Following the observation a peer dialogue about the observation is held. The observer is responsible for writing up the notes from the observation and discussion. The employee who was observed is responsible for submitting the original documents to his/her base school principal. Ideally, the pairing would result in a reciprocal arrangement; however, a Year 3 continuing contract employee may conduct an observation for a Year 1 or Year 2 colleague. It is recommended that an educational specialist observes no more than two colleagues in a given year. *Note: evaluators have the discretion to conduct/coordinate additional observations.*

Table 3: Minimum Number of Yearly Observations

Contract Status	Minimum Number of Observations Per Year	Post-Conference
Probationary first year specialist Specialists on an Employee Improvement Plan	4 quarterly	✓
Probationary specialists (excluding first year specialists) Continuing contract specialist in Year 3 of the evaluation cycle	3	✓
Continuing contract specialists in Year 1 or Year 2 of the evaluation cycle	1	✓

The purpose of the documentation log (see Part II) is to provide evidence of professional excellence. The items required provide evaluators with information they likely would not observe during the course of a typical school day. Specifically, the documentation log provides the educational specialist with an opportunity for self-reflection, demonstration of quality work, and a basis for two-way communication with an evaluator. The emphasis is on the quality of work, not the quantity of materials presented. Therefore, specific items are required of all educational specialists. Furthermore, the documentation log is used to organize the multiple data sources included in the educational specialist evaluation.

DOCUMENTATION LOG

Required documents are kept in Part III of the *Educational Specialist Performance Evaluation Handbook* behind the appropriate performance standard sheet. A checklist for items to include appears on the performance standard sheet. Documentation is not required for all performance standards as other data sources may be used. Documentation logs should be brought to evaluation meetings held with the evaluator.

The documentation log is either summarized by the professional in a discussion with the evaluator or is reviewed by the evaluator at the end of an evaluation cycle, as appropriate. Probationary professionals discuss their documentation collected to date at a mid-year review conference held with their evaluator. This mid-year review of documentation may be held in conjunction with an observation post-conference. Educational specialists bring their completed documentation logs to their summative evaluation conference which is held by the first Friday in May.

The purpose of a survey is to collect information that will help educational specialists reflect upon their work for continuous improvement (i.e., for formative evaluation); in other words, to provide feedback directly to the educational specialist for professional growth and development.

CLIENT SURVEYS

Recognizing the diversity of the educational specialist positions, a sample survey is provided in Part II. Educational specialists may use the sample survey, one of the surveys used by teachers (see the *Teacher Evaluation Handbook*), or a departmentally-developed survey written by the educational specialists and reviewed by the central office supervisor for that department. Regardless of the educational specialist survey used, the following items are required of all educational specialists:

- All surveys are completed anonymously to promote honest feedback.
- Annual administration of a survey is done by the end of the first semester.
- The survey is given to at least one appropriate stakeholder group as identified by the employee.
- The employee completes the *Survey Summary Sheet* (See Part II).
- A blank copy of the survey is included with the *Survey Summary Sheet* in the documentation log.

Some performance standards are best documented through observation (e.g., Program Services and Support); other standards may require additional documentation techniques (e.g., Student/Program Progress necessitates review of the data). Therefore, multiple data sources are used. Table 4 shows the alignment of performance standard by data source.

INTEGRATION OF DATA

Table 4: Aligning Multiple Data Sources With Performance Standards

Performance Standard	Goal Setting	Observation	Documentation Log	Client Survey
1. Knowledge of the Learning Community	/	X		/
2. Program Planning and Management		X	X	/
3. Program Services and Support		X	X	/
4. Assessment		/		/
5. Communication	/	/	X	/
6. Professionalism	/	/	X	/
7. Student Program/Progress	X	/	X	

X denotes a strong relationship between the performance standard and the data source.
/ denotes a relationship between the performance standard and the data source.

Assessment of performance quality occurs only at the summative evaluation stage, which comes at the end of the evaluation cycle (i.e., one year for probationary educational specialists and three years for continuing contract educational specialists). 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. The integrated data constitute the evidence used to determine the performance ratings for the summative evaluation for educational specialists in their summative evaluation year (see *Educational Specialist*

EVALUATION SCHEDULE

Summative Performance Report, Part II). Further details on the rating process are provided in next section of the *Handbook*.

Probationary Educational Specialists

Probationary first year educational specialists participate in a comprehensive orientation at the beginning of the school year and induction activities throughout the school year. The induction year consists of written and oral explanations of the following:

- the induction program requirements, procedures, and activities;
- all relevant division and school policies, operations, and resources;
- specialist and student-oriented services available in the division, school, and community;
- the social, cultural, and economic characteristics of the community being served by the school/school system;
- the Bedford County Schools' evaluation performance standards; and
- the division's criteria or requirements for successfully completing the probationary contract year.

For specialists hired after the orientation occurs, the base school principal is responsible for ensuring the new specialist receives an orientation to the Bedford County Schools' educational specialist performance evaluation system.

For all probationary educational specialists, the evaluator:

- collects and documents information related to performance in each dimension;
- identifies strengths and weaknesses in performance relative to the performance standards;
- counsels, coaches, and assists specialists during their induction contract period.

Successful completion of a probationary period is determined based upon review of the observation forms, the goal setting forms, and any additional data. Educational specialists who are successful demonstrate a satisfactory level of performance and professional growth as noted in the summative report form.

Continuing Contract Educational Specialists

The key difference in the evaluation schedule for continuing contract educational specialists is that they receive summative evaluations every three years. Years 1 and 2 are formative cycle years in which educational specialists work on enhancing their professional practice. In Year 3, a summative evaluation report is written by the evaluator and discussed with the educational specialist. The three-year cycle is contingent upon a high level of educational specialist performance.

The educational specialist's evaluator may recommend a change in the evaluation cycle in the event that a continuing contract specialist is not meeting the performance standards. If a specialist is recommended for formal yearly observation, the evaluation schedule followed is Year 3 in Table 5.

Table 5 details the evaluation schedules for each group of educational specialists. As illustrated, the procedures for evaluating the performance of educational specialists rely on a multiple data sources, including, but not limited to, observations and goal setting.

Documentation records are maintained by both the educational specialist and the principal/evaluator for the entire evaluation cycle. If the educational specialist transfers within Bedford County Public Schools, the documentation is to be forwarded to the receiving school's principal. At the end of an evaluation cycle, the evaluator submits the summative evaluation form to the central office for placement in educational specialist's personnel files by June 30.

**DOCUMEN-
TATION
RECORDS**

Table 5: Evaluation Schedule for Educational Specialists

Probationary	Continuing Contract Year in Cycle			Data Collection Procedure	Form(s)	Form Completed by		Timeline
	1	2	3			Evaluator	Educational Specialist	
X	X	X	X	Goal setting	Goal Setting for Educational Specialists form		X	First Friday in October
X	X	X	X	Observation with post-conference	Observation form	X		Varies*
X	X	X	X	Client Survey	Survey & Summary Report		X	End of first semester
X				Mid-year conference: Review of documentation log	Meeting scheduled by the principal		X**	March 1
X	X	X	X	Evaluation conference if non-renewal is anticipated	Summative Evaluation form	X		Second Tuesday in February
X			X	End-of-year results	Goal-Setting form Documentation Log Submitted		X	First Friday in May
	X	X			Goal-Setting form		X	First Friday in June
X			X	End-of-year conference	Summative Evaluation form	X		First Friday in May

* Educational specialists new to Bedford County are observed quarterly; all other probationary educational specialists are observed three times a year; continuing contract educational specialists have one annual observation at a minimum.

** The educational specialist brings the documentation log to the meeting. There is no separate form.

MAKING SUMMATIVE DECISIONS

Two major considerations apply when assessing job performance during summative evaluation: the actual standards and how well they are performed. The performance appraisal rubric and performance indicators provide a description of well-defined educational specialist performance standards.

The rating scale describes four levels of how well the standards (i.e., duties) are performed on a continuum from “exceeds standard” to “unsatisfactory.” The use of the scale enables evaluators to acknowledge effective performance (i.e., “exceeds standard” and “meets standard”) and provides two levels of feedback for educational specialists who do not meet expectations (i.e., “needs improvement” and “unsatisfactory”).

The following sections define the four rating levels, provide detailed information about the performance of expectations for improvement purposes, and describe the decision-making process for assessing performance. *PLEASE NOTE: Ratings are applied to individual performance standards, NOT performance indicators.*

Evaluators use four ratings when assessing performance of standards (i.e., “exceeds standard,” “meets standard,” “needs improvement,” “unsatisfactory”). Table 6 offers general descriptions of those ratings.

DEFINITIONS OF RATINGS

Table 6: Definitions of Terms Used in Rating Scale

Rating	Definition
Exceeds Standard	High-quality performance: <ul style="list-style-type: none"> ◆ exceeds the requirements contained in the job description as expressed in the evaluation criteria ◆ continually seeks opportunities to learn and apply new skills ◆ consistently exhibits behaviors that have a strong positive impact on staff, colleagues, students, and the school climate ◆ serves as a role model to others
Meets Standard	High-quality performance: <ul style="list-style-type: none"> ◆ meets the requirements contained in the job description as expressed in the evaluation criteria ◆ demonstrates willingness to learn and apply new skills ◆ exhibits behaviors that have a positive impact on stakeholders
Needs Improvement	Inconsistent performance: <ul style="list-style-type: none"> ◆ requires support in meeting the standards ◆ results in less than quality work performance ◆ leads to areas for professional improvement being jointly identified and planned between the educational specialist and evaluator
Unsatisfactory	Poor-quality performance: <ul style="list-style-type: none"> ◆ does not meet the requirements contained in the job description as expressed in the evaluation criteria ◆ may result in the employee not being recommended for continued employment

Evaluators have two tools to guide their rating of educational specialist performance for the summative evaluation: (a) the sample performance indicators and (b) the performance rubric.

Sample Performance Indicators

Performance indicators are used in the evaluation system to identify observable behaviors in the major job expectations. They were introduced on page 7. Examples of performance indicators for each performance standard may be found in Part III.

Performance Rubric

A performance rubric is provided for each of the seven educational specialist standards (see below for a sample; Part III includes rubrics related to each performance standard). The performance rubric is a behavioral summary scale that describes acceptable performance levels for each educational specialist performance standard. It states the measure of performance expected of educational specialists for each expectation and provides a general description of what a rating entails.

After collecting information through observations, goal setting, survey summaries, and other relevant sources such as other administrators with whom the specialists works, the evaluator rates an educational specialist’s performance for the summative evaluation. During the summative evaluation, the evaluator applies the four-point rating scale to evaluate performance on the seven educational specialist standards (see *Educational Specialist Performance Summative Report* in Part II). The results of the evaluation are discussed with the educational specialist at a summative evaluation conference.

Example of a Performance Rubric

Professionalism (6)			
Exceeds Standard* <i>In addition to meeting the standard ...</i>	Meets Standard**	Needs Improvement	Unsatisfactory
The educational specialist is a professional role model for others, engaging 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 maintains a professional demeanor, participates in professional growth opportunities, demonstrates an understanding of the program, and contributes to the profession.	The educational specialist inconsistently: participates in professional growth activities, applies strategies and information from professional growth opportunities, serves the profession, and/or demonstrates professional judgment.	The educational specialist demonstrates inflexibility, a reluctance to support others in the work of the school, and/or rarely takes advantage of professional growth opportunities.

***“Meets Standard” is the baseline of acceptable performance for educational specialists and is the actual performance standard.*

Evaluators make judgments about performance of the seven performance standards based on all available evidence. The performance rubrics guide evaluators in assessing *how well* a standard is performed. They are provided to increase reliability among evaluators and to help educational specialists to focus on ways to enhance their professional practice. Summative evaluations are to be completed annually by the first Friday in May. The evaluator submits the signed *Educational Specialist Performance Summative Report* to the School Board office by June 30.

Educational specialists are advised of the following Bedford County Public Schools regulation related to educational specialist compensation.

Compensation for Employees on an Employee Improvement Plan

While working on a plan for improvement of performance, the employee will be **ineligible** for salary step advancement if the School Board approves compensation increases. The employee on the Employee Improvement Plan would remain at his or her current step placement on the salary scale. If the School Board approved a salary scale cost-of-living increase and the dollar value of the step placement increased, then the employee on the improvement plan would receive the cost-of-living increase. After removal from the designated status of being on an Employee Improvement Plan, an employee would return to normal status. Such employee, returning to normal status, will be offered an adjusted contract or salary agreement which will have his or her salary step placement adjusted to the step placement prior to his or her assignment to the Employee Improvement Plan status with any additional step placement increment as justified by employment service. Payment of the new salary amount will be prorated based on the date of the adjustment of the contract or salary agreement.

Adopted: March 24, 2005

Text excerpted from Bedford County Public School's GCNO-R Policy

IMPROVING PERFORMANCE

If an educational specialist's performance does not meet the expectations established by Bedford County Public Schools, the educational specialist may be placed on an Employee Improvement Plan (see *Employee Improvement Plan Form* in Part II).

PLACEMENT

An *Employee Improvement Plan* is a tool that evaluators may use at any point during the year for educational specialists whose professional practice would benefit from additional supports. It is designed to support an educational specialist in addressing areas of concern through targeted supervision and additional resources.

Additionally, an *Employee Improvement Plan* is implemented if one of the following scenarios occurs at the end of any data-collection period:

- ♦ An educational specialist receives two or more ratings of “needs improvement” in a summative evaluation.
- ♦ An educational specialist receives one rating of “unsatisfactory” on any of the seven educational specialist performance standards in a summative evaluation.

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

IMPLEMENTATION

- a) formulate an *Employee Improvement Plan*.
- b) provide written notification to the educational specialist of the area(s) of concern that need to be addressed (the plan serves as notification).
- c) confer with the educational specialist on elements of the *Employee Improvement Plan* and develop a timeline for implementation.

Assistance may include:

- ♦ improvement strategies from curriculum or program coordinators.
- ♦ peer support from within the building or another building.
- ♦ participation in conferences, classes, workshops, etc.
- ♦ other resources to be identified.

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

RESOLUTION

- a) Sufficient improvement has been achieved: The educational specialist is no longer on an *Employee Improvement Plan*.
- b) Partial improvement has been achieved but more improvement is needed: The specialist remains on an *Employee Improvement Plan*.
- c) Little or no improvement has been achieved: The educational specialist is recommended for non-renewal/dismissal.

PART II

EVALUATION FORMS INTRODUCTION

Part II contains copies of forms used during the supervision of educational specialist. The forms are used by the evaluator and the educational specialist to provide evidence of quality work.

Table 7: Items Used as Evidence of Quality Work Performance

Form	Completed by	
	Evaluator	Ed. Specialist
Goal Setting Form		X
Observation Record Form	X	
Documentation Log		X
Surveys		X
Educational Specialist Summative Performance Report	X	
Employee Improvement Plan	X	

Goal Setting Explanation and Form

- I. **Setting:** Describe the population/program and special circumstances of the goal setting.
- II. **Identify the content area:** The area/topic addressed based on learner achievement, learner or program progress, or observational data.
- III. **Provide baseline data:** What does the current data show about the learners/program?
 - A. Collect and review data
 - B. Analyze the data
 - C. Interpret the data
 - D. Determine needs

Examples of Data Sources for Learner Achievement

Criterion- and Norm-Referenced Tests

- ◆ Advanced Placement Tests
- ◆ Behavioral Assessment Scale for Children (BASC)
- ◆ Brigance
- ◆ Virginia SOL
- ◆ PIAT
- ◆ PLATO
- ◆ ACT
- ◆ PSAT SAT, SATII
- ◆ KTEAII
- ◆ Woodcock Johnson
- ◆ Flanagan
- ◆ PALS/DRA/QRI
- ◆ VAAP
- ◆ VGLA
- ◆ Stanford 10

School Records

- ◆ Cumulative folders/previous academic records
- ◆ Individual Education Program (IEP)
- ◆ 504 Plan
- ◆ Number of discipline referrals
- ◆ Drop out rates
- ◆ Graduation rates
- ◆ Student attendance

Benchmark Tests

- ◆ Specialist-made benchmark test based on the standards of the profession/field/content
- ◆ President's Physical Fitness Test

Educational Specialist Assessment

- ◆ Quizzes
- ◆ Tests (Pre- and Posttests)
- ◆ Authentic assessments/portfolios/writing samples/running records
- ◆ Grade analysis by nine weeks/ interim reports
- ◆ Semester/end-of-course examinations
- ◆ Pre-/posttests
- ◆ Conference logs
- ◆ Word Analysis (*Words Their Way*)
- ◆ Compass
- ◆ Writing predictor

Other Data

- Program progress measures
- Job rates
- Therapy logs
- Circulation Statistics

- IV. **Write goal statement:** What you want learners/program to accomplish?
 - A. Select an emphasis for your goal focusing on the classroom/student services professional level.
 - B. Develop annual goal.
- V. **Means for attaining the goal:** Identify three to five activities used to accomplish the goal including how progress is measured and target dates.
Indicate areas in which the professional development activity is related (i.e., SOL, technology, assessment, learning environment/climate, school safety, family involvement, intervention, other).

Examples of Strategies for Improvement

- ◆ Modified teaching/work arrangement
- ◆ Cooperative planning with master student services personnel, team members, department members
- ◆ Demonstration lessons/service delivery by colleagues, curriculum specialists, student services professional mentors
- ◆ Visits to other classrooms
- ◆ Use of instructional strategies (e.g., CRISS differentiation, PANDY, interactive planning)
- ◆ Focused classroom observation
- ◆ Development of curricular supplements
- ◆ Completion of workshops, conferences, coursework
- ◆ Co-leading; collaborative teaching

VI. *End-of-year data results:* Accomplishments at the end of the year.

The Goal Setting for Learner/Program Progress Form follows.

Bedford County Public Schools: Educational Specialist Annual Goal(s) for Learner/Program Progress Form

Educational Specialist _____ Position _____ Date: _____ Goal _____ of _____
Assignment *Check one:* School _____ Itinerate Evaluator _____ School Year _____

This sheet is to be submitted to the evaluator by the first Friday in October.

<p>I. Setting: <i>[Describe the population/program and special learning circumstances.]</i></p>
<p>II. Content Area/Subject/Field <i>[The area/topic addressed based on student achievement, program progress, data analysis, or observational data.]</i></p>
<p>III. Baseline Data <i>[What does the current data show?]</i></p> <p style="text-align: right;"><input type="checkbox"/> <i>See attached data</i></p>
<p>IV. Goal Statement <i>[Describe what you want learners/program to accomplish.]</i></p>

V. Means for Attaining Goals *[Activities used to accomplish the goal (list 3-5 strategies/activities).]*

Professional development activities relate to the following (check all that apply):

- | | | | | |
|--|---|---------------------------------------|---|-----------------------------------|
| <input type="checkbox"/> Assessment | <input type="checkbox"/> Family Involvement | <input type="checkbox"/> Intervention | <input type="checkbox"/> Learning Environment/Climate | <input type="checkbox"/> Literacy |
| <input type="checkbox"/> School Safety | <input type="checkbox"/> Virginia Standards of Learning | <input type="checkbox"/> Technology | <input type="checkbox"/> Other _____ | |

VI. End-of-Year Data/Results *[Accomplishments at end of year.]*

End-of-Year Review

- Appropriate data received
Discussion held Yes No NA Evaluator's Initials _____ Date _____

Initial Proposal

Educational Specialist's Signature _____ *Date* _____ *Evaluator's Signature* _____ *Date* _____

Bedford County Public Schools

Observation Form

Educational Specialist: _____ **Base School:** _____
Date: _____ **Time: Start** _____ **End** _____ **Position (check one)** Principal Peer
Observer's Name _____ Central Office Supervisor

This form focuses on performance standards that likely will be observed in a formal observation (minimum length-30 minutes). Not all performance standards or sample performance indicators may be observed during an observation. A space for notes is provided at the end of the form for additional comments, commendations, and recommendations relating to other performance standards that the observer may observe. *A copy of the completed observation form is given to the educational specialist at the post-conference.*

<p>1. KNOWLEDGE OF THE LEARNING COMMUNITY</p> <ul style="list-style-type: none"> ◆ District, school, family, and community resource use ◆ Understanding of student developmental stages ◆ Accommodations of learning styles and student backgrounds ◆ Variety of data sources to determine needs and support program 	<p>SPECIFIC EXAMPLES:</p>
<p>2. PLANNING AND PROGRAM MANAGEMENT</p> <ul style="list-style-type: none"> ◆ Local, state, and federal regulations, policies, guidelines, and procedures ◆ Current knowledge ◆ Safe environment ◆ Program records maintained ◆ Time use ◆ Resources identified to address learner needs 	<p>SPECIFIC EXAMPLES:</p>
<p>3. PROGRAM SERVICES AND SUPPORT</p> <p>Direct Services to Learners</p> <ul style="list-style-type: none"> ◆ Curriculum selection, development, implementation, support ◆ Technology Use ◆ Variety of strategies used ◆ Services support mastery of state and national standards <p>Collaboration/Consultation</p> <ul style="list-style-type: none"> ◆ Instructional staff collaboration ◆ Regular consultation with other stakeholders on programs/student progress 	<p>SPECIFIC EXAMPLES:</p>

ADDITIONAL NOTES

Observer's Signature: _____
 NOTES: Post-conference scheduled for _____ Email me more about _____

Bedford County Public Schools
Post-Observation Conference Record

Conference Date _____

Directions

This form is to be attached to the observation form. Observers use this form with educational specialists to guide the dialogue after conducting formal observations. The post-observation discussion focuses on what the observer saw as well as providing a forum to dialogue about the other performance standards. Observers should provide a copy of the completed "Post-observation Conference Record" to educational specialists.

<p>4. ASSESSMENT</p> <ul style="list-style-type: none"> ◆ State and local assessments used to guide decisions ◆ Proficient in administering, scoring, evaluating, and interpreting data from instruments or records 	<p>SPECIFIC EXAMPLES:</p>
<p>5. COMMUNICATION</p> <ul style="list-style-type: none"> ◆ Precise language ◆ Technology use ◆ Interactions with parents/guardians, staff, and community members 	<p>SPECIFIC EXAMPLES:</p>
<p>6. PROFESSIONALISM</p> <ul style="list-style-type: none"> ◆ Legal compliance ◆ Professional behavior ◆ Confidentiality ◆ School duties, policies, and procedures ◆ Knowledge and skills of subject area taught ◆ Reflection ◆ Professional development ◆ Committee/school activity service 	<p>SPECIFIC EXAMPLES:</p>
<p>7. STUDENT/PROGRAM PROGRESS</p> <ul style="list-style-type: none"> ◆ Understanding of concepts, principles, and strategies to enable learner success ◆ Systematically reviews and documents progress ◆ Goals established collaboratively ◆ Evidence of meeting goals 	<p>SPECIFIC EXAMPLES:</p>

Observer's Signature _____ **Date** _____

Educational Specialist's Signature _____ **Date** _____

Bedford County Public Schools
Documentation Log Description

What is a documentation log?

A documentation log:

- ◆ is one component of a multi-source evaluation and complements the observation components of the educational specialist evaluation system.
- ◆ is provided by the school system.
- ◆ is Part III of the *Educational Specialist Performance Evaluation Handbook*.
- ◆ requires documentation listed within each performance standard section.
- ◆ is a work in progress and is to be continually maintained throughout the evaluation period.
- ◆ should be user-friendly (neat, organized).
- ◆ remains in your possession.
- ◆ should be available at each evaluation meeting.
- ◆ belongs to you (even if you change schools or leave the school division).

For how long is documentation kept?

The documentation log is maintained:

- probationary contract employee or employee on a plan of improvement – single year
- continuing contract employee during the entire three-year cycle. This means there will be three labeled samples of each item.

What items are required?

Performance Standard 2: Program Planning and Management

- Schedule-summarize as a brief narrative, bulleted list, or chart the time spent in relation to the various job expectations. For example, one may show the various instructional and administrative duties in terms of time use.

Performance Standard 3: Program Services and Support

- Sample of documentation required by specialty area (e.g., screenings, medication log, visitation log, daily notes)
- Client Survey Summary

Performance Standard 5: Communication

- Show a sample of proof of communication (e.g., Student File, Communication Log*, Daily Contact Record)

Performance Standard 6: Professionalism

- Proof of Professional Growth (e.g., Professional Development Log*, Recertification Points, ERO System Print-out)

Performance Standard 7: Student/Program Progress

- Goal Setting Form

* Samples of a communication log and a professional development log are provided. These forms are merely samples and not intended to be used if the professional already has an established and appropriate means of documentation.

Sample Communication Log

Professional's Name _____ School Year _____

Date	Person	Purpose	Mode	Notes
			<input type="checkbox"/> Conference <input type="checkbox"/> Email <input type="checkbox"/> Note/Letter <input type="checkbox"/> Telephone	
			<input type="checkbox"/> Conference <input type="checkbox"/> Email <input type="checkbox"/> Note/Letter <input type="checkbox"/> Telephone	
			<input type="checkbox"/> Conference <input type="checkbox"/> Email <input type="checkbox"/> Note/Letter <input type="checkbox"/> Telephone	
			<input type="checkbox"/> Conference <input type="checkbox"/> Email <input type="checkbox"/> Note/Letter <input type="checkbox"/> Telephone	
			<input type="checkbox"/> Conference <input type="checkbox"/> Email <input type="checkbox"/> Note/Letter <input type="checkbox"/> Telephone	
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			<input type="checkbox"/> Conference <input type="checkbox"/> Email <input type="checkbox"/> Note/Letter <input type="checkbox"/> Telephone	
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			<input type="checkbox"/> Conference <input type="checkbox"/> Email <input type="checkbox"/> Note/Letter <input type="checkbox"/> Telephone	
			<input type="checkbox"/> Conference <input type="checkbox"/> Email <input type="checkbox"/> Note/Letter <input type="checkbox"/> Telephone	

Sample Professional Development Log

Professional's Name _____

School Year _____

Professional Development Activity	Date	Location	Evidence of Satisfactory Completion Received*
			<input type="checkbox"/> Grade <input type="checkbox"/> Certificate <input type="checkbox"/> Other _____
			<input type="checkbox"/> Grade <input type="checkbox"/> Certificate <input type="checkbox"/> Other _____
			<input type="checkbox"/> Grade <input type="checkbox"/> Certificate <input type="checkbox"/> Other _____
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			<input type="checkbox"/> Grade <input type="checkbox"/> Certificate <input type="checkbox"/> Other _____

* Documentation should be maintained by the professional and is available upon evaluator's request.

Bedford County Public Schools
Client Survey[†]

Educational Specialist's Name _____ School Year _____

Base School: _____

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

Directions: DO NOT PUT YOUR NAME ON THIS SURVEY. Listed below are several statements about the educational specialist. Mark the most appropriate response to each statement. If you wish to comment, please write your comments in the space provided. *You may attach additional sheets.*

	Strongly Agree	Agree	Disagree	Strongly Disagree	Do Not Know
<i>The educational specialist</i>					
1. provides feedback in a reasonable amount of time.	<input type="checkbox"/>				
2. is accessible to me.	<input type="checkbox"/>				
3. responds to emergency situations.	<input type="checkbox"/>				
4. asks for information about the student/situation from me to aid in the specialist's decision-making.	<input type="checkbox"/>				
5. shares methods with me to facilitate the student's success.	<input type="checkbox"/>				
6. advocates for the student.	<input type="checkbox"/>				
7. takes part, as appropriate, in IEP meetings.	<input type="checkbox"/>				
8. gives me feedback on my referral(s).	<input type="checkbox"/>				
9. facilitates referrals for needs to community agencies or services.	<input type="checkbox"/>				
10. explains laws and regulations.	<input type="checkbox"/>				
11. is respectful of others.	<input type="checkbox"/>				
12. promotes open communication.	<input type="checkbox"/>				

Comments

Please mail or place this survey in the educational specialist's box by _____.

[†] Departments may develop position-specific surveys that are reviewed by Central Office supervisor to use in lieu of this general survey.

Bedford County Public Schools
Educational Specialist Summative Performance Report

Educational Specialist _____ **Base School** _____

Contract Status Probationary Continuing Contract **School Year** _____

Directions

Evaluators use this form by the first Friday in May to provide the educational specialist with an assessment of performance. The educational specialist should receive a copy of the form at the end of each evaluation year. The signed form is submitted to the Central Office by June 30.

<p>Performance Standard 1: Knowledge of the Learning Community The educational specialist identifies and addresses the needs of the target learning community by demonstrating respect for individual differences and understanding of cultures, backgrounds, and learning styles.</p> <table style="width: 100%; border: none;"> <tr> <td style="width: 50%; border: none;"> <ul style="list-style-type: none"> ◆ District, school, family, and community resource use ◆ Understanding of student developmental stages </td> <td style="width: 50%; border: none;"> <ul style="list-style-type: none"> ◆ Accommodations of learning styles and student backgrounds ◆ Variety of data sources to determine needs and support program </td> </tr> </table> <p>Comments</p> 	<ul style="list-style-type: none"> ◆ District, school, family, and community resource use ◆ Understanding of student developmental stages 	<ul style="list-style-type: none"> ◆ Accommodations of learning styles and student backgrounds ◆ Variety of data sources to determine needs and support program 	<p>Rating</p> <p><input type="checkbox"/> Exceeds Standard</p> <p><input type="checkbox"/> Meets Standard</p> <p><input type="checkbox"/> Needs Improvement</p> <p><input type="checkbox"/> Unsatisfactory</p>
<ul style="list-style-type: none"> ◆ District, school, family, and community resource use ◆ Understanding of student developmental stages 	<ul style="list-style-type: none"> ◆ Accommodations of learning styles and student backgrounds ◆ Variety of data sources to determine needs and support program 		
<p>Performance Standard 2: Program Planning and Management The educational specialist plans, implements, and manages programs and/or services to meet the diverse needs of all learners.</p> <table style="width: 100%; border: none;"> <tr> <td style="width: 50%; border: none;"> <ul style="list-style-type: none"> ◆ Local, state, and federal regulations, policies, guidelines, and procedures ◆ Current knowledge ◆ Safe environment </td> <td style="width: 50%; border: none;"> <ul style="list-style-type: none"> ◆ Program records maintained ◆ Time use ◆ Resources identified to address learner needs </td> </tr> </table> <p>Comments</p> 	<ul style="list-style-type: none"> ◆ Local, state, and federal regulations, policies, guidelines, and procedures ◆ Current knowledge ◆ Safe environment 	<ul style="list-style-type: none"> ◆ Program records maintained ◆ Time use ◆ Resources identified to address learner needs 	<p>Rating</p> <p><input type="checkbox"/> Exceeds Standard</p> <p><input type="checkbox"/> Meets Standard</p> <p><input type="checkbox"/> Needs Improvement</p> <p><input type="checkbox"/> Unsatisfactory</p>
<ul style="list-style-type: none"> ◆ Local, state, and federal regulations, policies, guidelines, and procedures ◆ Current knowledge ◆ Safe environment 	<ul style="list-style-type: none"> ◆ Program records maintained ◆ Time use ◆ Resources identified to address learner needs 		

<p>Performance Standard 3: Program Services and Support</p> <p>The educational specialist uses knowledge of subject/content/field/technology to implement services and support for the targeted learning community consistent with established standards and guidelines.</p> <p>Direct Services to Learners</p> <ul style="list-style-type: none"> ◆ Curriculum selection, development, implementation, support ◆ Technology Use ◆ Variety of strategies used ◆ Services support mastery of state and national standards <p>Collaboration/Consultation</p> <ul style="list-style-type: none"> ◆ Instructional staff collaboration ◆ Regular consultation with other stakeholders on programs/student progress <p><i>Comments</i></p>	<p>Rating</p> <p><input type="checkbox"/> Exceeds Standard</p> <p><input type="checkbox"/> Meets Standard</p> <p><input type="checkbox"/> Needs Improvement</p> <p><input type="checkbox"/> Unsatisfactory</p>
<p>Performance Standard 4: Assessment</p> <p>The educational specialist gathers, analyzes and uses data to measure student or program progress, guide instruction, and provide timely feedback to students, families, and staff.</p> <ul style="list-style-type: none"> ◆ State and local assessments used to guide decisions ◆ Proficient in administering, scoring, evaluating, and interpreting data from instruments or records <p><i>Comments</i></p>	<p>Rating</p> <p><input type="checkbox"/> Exceeds Standard</p> <p><input type="checkbox"/> Meets Standard</p> <p><input type="checkbox"/> Needs Improvement</p> <p><input type="checkbox"/> Unsatisfactory</p>
<p>Performance Standard 5: Communication</p> <p>The educational specialist communicates effectively with students, parents/guardians, and the community.</p> <ul style="list-style-type: none"> ◆ Precise language ◆ Technology use ◆ Interactions with parents/guardians, staff, and community members <p><i>Comments</i></p>	<p>Rating</p> <p><input type="checkbox"/> Exceeds Standard</p> <p><input type="checkbox"/> Meets Standard</p> <p><input type="checkbox"/> Needs Improvement</p> <p><input type="checkbox"/> Unsatisfactory</p>

<p>Performance Standard 6: Professionalism The educational specialist maintains a professional demeanor, participates in professional growth opportunities, demonstrates an understanding of the program, and contributes to the profession.</p> <ul style="list-style-type: none"> ◆ Legal compliance ◆ Professional behavior ◆ Confidentiality ◆ School duties, policies, and procedures ◆ Knowledge and skills of subject area taught ◆ Reflection ◆ Professional development ◆ Committee/school activity service <p><i>Comments</i></p>	<p>Rating</p> <p><input type="checkbox"/> Exceeds Standard</p> <p><input type="checkbox"/> Meets Standard</p> <p><input type="checkbox"/> Needs Improvement</p> <p><input type="checkbox"/> Unsatisfactory</p>
<p>Performance Standard 7: Student/Program Progress The work of the educational specialist results in acceptable and measurable student or program progress based on established standards, district goals, and /or school goals.</p> <ul style="list-style-type: none"> ◆ Understanding of concepts, principles, and strategies to enable learner success ◆ Systematically reviews and documents progress ◆ Goals established collaboratively ◆ Evidence of meeting goals <p><i>Comments</i></p>	<p>Rating</p> <p><input type="checkbox"/> Exceeds Standard</p> <p><input type="checkbox"/> Meets Standard</p> <p><input type="checkbox"/> Needs Improvement</p> <p><input type="checkbox"/> Unsatisfactory</p>

Strengths:

Areas Needing Improvement:

Overall Evaluation Summary Criteria	
<p><input type="checkbox"/> Met, recommended for re-employment</p>	<p>Not met due to:</p> <ul style="list-style-type: none"> ◆ 1 or more <i>Unsatisfactory</i> rating(s) ◆ 2 or more <i>Needs Improvement</i> ratings <p>The educational specialist is recommended for:</p> <p><input type="checkbox"/> Re-employment and placement on an <i>Employee Improvement Plan</i></p> <p><input type="checkbox"/> Dismissal</p>

 Evaluator's Signature/Date

 Educational Specialist's Signature/Date

Bedford County Public Schools

EMPLOYEE IMPROVEMENT PLAN

Educational Specialist

Base School

Evaluator

School Year

Evaluator's Signature/Date Initiated

Specialist's Signature/Date Initiated

Performance standard(s) requiring improvement:

Objectives and strategies for improvement¹:

<i>Performance Objective</i>	<i>Procedures/Resources</i>	<i>Target Dates</i>

Results of improvement plan¹:

<i>Performance Objective</i>	<i>Comments</i>	<i>Review Dates²</i>

Recommendation based on outcome of Employee Improvement Plan:

- Sufficient improvement has been achieved: The specialist is no longer on an improvement plan.
- Some improvement has been achieved but more improvement is needed: The specialist remains on an *Employee Improvement Plan*.
- Little or no improvement has been achieved: The specialist is recommended for dismissal.

Evaluator's Signature/Date Completed

Specialist's Signature/Date Completed

¹ These sections are to be completed collaboratively by the evaluator and the 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 specialist. _____ **Additional Pages Attached**

PART III

PERFORMANCE STANDARDS

Performance Standard 1: Knowledge of the Learning Community
--

The educational specialist identifies and addresses the needs of the target learning community by demonstrating respect for individual differences and understanding of cultures, backgrounds, and learning styles.

Sample Performance Indicators:

- Uses district, school, family and community resources to help meet student and/or program needs.
- Demonstrates an understanding of developmental stages of students.
- Identifies and accommodates various learning styles and cultural, ethnic, and linguistic backgrounds to assist in the implementation of intervention plans.
- Uses a variety of data sources to determine student needs and support instructional programs.

Performance Rubric

Exceeds Standard <i>In addition to meeting the standard...</i>	Meets Standard*	Needs Improvement	Unsatisfactory
The educational specialist addresses the needs of the target learning community in a highly effective manner.	The educational specialist identifies and addresses the needs of the target learning community by demonstrating respect for individual differences and understanding of cultures, backgrounds, and learning styles.	The educational specialist attempts, but efforts are generally ineffective in demonstrating knowledge and understanding of the needs of the target learning community.	The educational specialist consistently demonstrates a lack of awareness of the needs of the target learning community or rarely makes appropriate accommodations to meet those needs.

**"Meets Standard" is the baseline of acceptable performance for educational specialists and is the actual performance standard.*

Documentation Log

No documentation required.

Performance Standard 2: Program Planning and Management

The educational specialist plans, implements, and manages programs and/or services to meet the diverse needs of all learners.

Sample Performance Indicators:

- Understands and follows applicable local, state & federal regulations, policies, guidelines and procedures.
- Demonstrates current knowledge of field/subject/content matter.
- Provides a safe environment for interactions.
- Organizes and maintains appropriate program records.
- Demonstrates effective scheduling and time management skills.
- Identifies and manages available resources to address learner needs.

Performance Rubric

Exceeds Standard <i>In addition to meeting the standard...</i>	Meets Standard*	Needs Improvement	Unsatisfactory
The educational specialist consistently plans, implements, and manages programs and/or services in an expert manner and provides leadership to others in meeting the diverse needs of all learners.	The educational specialist plans, implements, and manages programs and/or services to meet the diverse needs of all learners.	The educational specialist attempts, but efforts are generally ineffective in planning, implementing, and /or managing programs and/or services to meet the diverse needs of all learners.	The educational specialist rarely plans, implements, or manages programs and/or services to meet the diverse needs of all learners.

**"Meets Standard" is the baseline of acceptable performance for educational specialists and is the actual performance standard.*

Documentation Log

Check the boxes below to indicate required documentation items included.

Probationary Schedule – summarize as a brief narrative, bulleted list, or chart the time spent in relation to the various job expectations.

Continuing Contract

Year 1 Schedule
 Year 2 Schedule
 Year 3 Schedule

Performance Standard 3: Program Services and Support

The educational specialist uses knowledge of subject/content/field/technology to implement services and support for the targeted learning community consistent with established standards and guidelines.

Sample Performance Indicators

Direct Services to Learners

- Selects, develops, organizes, implements, or supports curriculum for specific learner and/or program needs.
- Uses technology as appropriate to deliver services and programs.
- Presents information and services using varied strategies to meet learner needs and diversity.
- Provide services that will support mastery of state and national standards.

Collaboration/Consultation with Staff and Others Performance Indicators

- Collaborates with instructional staff to design implement, or support services for specific learner or program needs.
- Consult on a continual basis with administration, parents, community agencies, school and support personnel to resolve issues and/or inform on progress related to the provision of programs/services to individual learners.

Performance Rubric

Exceeds Standard <i>In addition to meeting the standard...</i>	Meets Standard*	Needs Improvement	Unsatisfactory
The educational specialist consistently demonstrates a high level of performance in implementing services/support to the learning community and/or provides a key leadership role to others in enhancing professional skills.	The educational specialist uses knowledge of subject/content/field/technology to implement services and support for the targeted learning community consistent with established standards and guidelines.	The educational specialist attempts to implement services, but efforts are generally ineffective addressing the needs of the targeted learning community.	The educational specialist rarely implements or improperly implements services to the targeted learning community.

**"Meets Standard" is the baseline of acceptable performance for educational specialists and is the actual performance standard.*

Documentation Log

Check the boxes below to indicate required documentation items included.

Probationary Sample of documentation required by specialty area
 Client Survey Summary and blank copy of the survey given

Continuing Contract

Year 1 Sample of documentation required by specialty area
 Client Survey Summary and blank copy of the survey given
Year 2 Sample of documentation required by specialty area
 Client Survey Summary and blank copy of the survey given
Year 3 Sample of documentation required by specialty area
 Client Survey Summary and blank copy of the survey given

Performance Standard 4: Assessment

The educational specialist gathers, analyzes and uses data to measure student or program progress, guide instruction, and provide timely feedback to students, families, and staff.

Sample Performance Indicators

- Uses state and local assessment data to modify strategies/interventions/services and programs.
- Demonstrates proficiency in administering, scoring, evaluating and interpreting data from instruments or records.

Performance Rubric

Exceeds Standard <i>In addition to meeting the standard...</i>	Meets Standard*	Needs Improvement	Unsatisfactory
The educational specialist consistently demonstrates a high level of performance and/or takes a leadership role in gathering, interpreting, and applying assessment data to guide instructional and program planning and provides timely feedback to students, families and staff.	The educational specialist gathers, analyzes and uses data to measure student or program progress, guide instruction, and provides timely feedback to students, families and staff.	The educational specialist attempts, but is generally ineffective in gathering, interpreting, and applying assessment data, and/or providing timely feedback to students, families, and staff.	The educational specialist rarely uses data to measure student progress, implement program planning, guide instruction, and provide timely and relevant feedback to students, families and staff.

**"Meets Standard" is the baseline of acceptable performance for educational specialists and is the actual performance standard.*

Documentation Log

No documentation required.

Performance Standard 5: Communication

The educational specialist communicates effectively with students, parents/guardians, and the community.

Sample Performance Indicators

- Uses precise language and acceptable forms of oral and written expression.
- Initiates and maintains communication with stakeholders to support the needs of the learning community.
- Supports, promotes, and communicates the mission, vision, and goals of the school division and program.
- Works collaboratively with stakeholders (colleagues, parents, supervisors, community resources, etc.) to support the success of the learning community.
- Uses technology effectively.

Performance Rubric

Exceeds Standard <i>In addition to meeting the standard...</i>	Meets Standard*	Needs Improvement	Unsatisfactory
The educational specialist demonstrates initiative in enhancing effective communication techniques between members of the learning community that results in improved collaboration.	The educational specialist communicates effectively with students, parents/guardians, and the community.	The educational specialist attempts, but is generally ineffective in communicating with students, parents/guardians, and the community.	The educational specialist rarely communicates effectively with students, parents/guardians, and the community.

**"Meets Standard" is the baseline of acceptable performance for educational specialists and is the actual performance standard.*

Documentation Log

Check the boxes below to indicate required documentation items included.

Probationary Sample of proof of communication (e.g., Student File, Communication Log, Daily Contact Record)

Continuing Contract

- Year 1 Sample of proof of communication
 Year 2 Sample of proof of communication
 Year 3 Sample of proof of communication

Performance Standard 6: Professionalism

The educational specialist maintains a professional demeanor, participates in professional growth opportunities, demonstrates an understanding of the program, and contributes to the profession.

Sample Performance Indicators

- Follows federal, state, and local laws, and school board rules, guidelines and policies.
- Maintains a positive pattern of professional behavior (appearance, punctuality and attendance).
- Respects and maintains confidentiality.
- Performs assigned duties and follows policies and procedures.
- Demonstrates knowledge and skills relevant to the profession.
- Evaluates and identifies areas of personal strengths and weaknesses related to professional skills.
- Sets goals for improvement of skills and professional performance.
- Participates in professional growth activities and incorporates learning into the program.
- Mentors, trains, and/or supports colleagues in professional growth opportunities.

Exceeds Standard <i>In addition to meeting the standard...</i>	Meets Standard*	Needs Improvement	Unsatisfactory
The educational specialist is a professional role model for others, engaging 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 maintains a professional demeanor, participates in professional growth opportunities, demonstrates an understanding of the program, and contributes to the profession.	The educational specialist inconsistently: participates in professional growth activities, applies strategies and information from professional growth opportunities, serves the profession, and/or demonstrates professional judgment.	The educational specialist demonstrates inflexibility, a reluctance to support others in the work of the school, and/or rarely takes advantage of professional growth opportunities.

*"Meets Standard" is the baseline of acceptable performance for educational specialists and is the actual performance standard.

Documentation Log

Check the boxes below to indicate required documentation items included.

Probationary Proof of professional growth (e.g., Professional Development Log, Recertification Points, ERO System Print-out)

Continuing Contract

Year 1 Proof of professional growth
 Year 2 Proof of professional growth
 Year 3 Proof of professional growth

Performance Standard 7: Student/Program Progress

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

Sample Performance Indicators

- Demonstrates an understanding of the concepts, principles and strategies that enable learners to achieve and be academically successful.
- Uses systematic procedures to review and document student progress including use of state and local assessments.
- Works collaboratively with others to establish student achievement or program goals.
- Demonstrates necessary evidence of student achievement and /or program goals.

Performance Rubric

Exceeds Standard <i>In addition to meeting the standard...</i>	Meets Standard**	Needs Improvement	Unsatisfactory
The work of the educational specialist results in a high level of student achievement for all subgroups* and/or program progress.	The work of the educational specialist results in acceptable and measurable student or program progress based on established standards, district goals, and/or school goals.	The work of the educational specialist results in an acceptable level of student achievement for some subgroups and/or program progress.	The work of the educational specialist does not result in an acceptable level student achievement and/or program progress.

*Subgroups (e.g., AYP classifications, ESL, school level, age-groups, specific programs) as appropriate to the professional's work demographics

**"Meets Standard" is the baseline of acceptable performance for educational specialists and is the actual performance standard.

Documentation Log

Check the boxes below to indicate required documentation items included.

Probationary Goal Setting Form(s)

Continuing Contract

Year 1 Goal Setting Form(s)

Year 2 Goal Setting Form(s)

Year 3 Goal Setting Form(s)