Employee Performance Evaluation Process
Shelby County Schools

Shelby County Schools

Employee Performance Evaluation Protocol

Division of Human Capital
Department of Human Resources

July 2014
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Overview

The development and implementation of the Shelby County Schools’ Employee Performance Evaluation Protocol for classified employees represents an effort to establish standards of excellence and quality for job performance. The evaluation system should enable continuous improvement by all employees. This year’s evaluation cycle will extend from August 4, 2014 to June 30, 2015. This performance evaluation system will require district personnel to identify key responsibilities and assess employment performance on a set of established standards.

The performance evaluation system is objective and designed to measure the performance of all classified positions. The system is expected to facilitate a cooperative climate between the evaluator and the employee and to focus on performance rather than process. In conferences at the beginning of the performance evaluation period, the evaluator and the employee will discuss areas of key job responsibility, benchmarks and goals. This should result in the development of challenging and quality standards that both parties agree to.

The primary objectives of the performance evaluation system are:

- To develop a fair, consistent, and objective performance evaluation process
- To provide a planning process to identify job responsibilities
- To ensure job responsibilities encompass the school/departmental goals
- To identify areas that need improvement and areas of strength
- To improve job performance and job satisfaction

The foundation of the evaluation system is the identification of areas of key responsibilities and the determination of the importance of each of these key responsibilities. There are certain assumptions that relate to the performance evaluation system.

- Key job responsibilities can be identified.
- Key job responsibilities can be ranked based on importance.
- The majority of key job responsibilities can be measured based on objective standards and results achieved.
- The majority of results achieved can be supported by objective data.
The performance evaluation process begins with planning and goal setting during the Initial Conference. Using either the appropriate Skills Set Checklist or the employee’s Job Description, the employee and supervisor will select the top five job performance objectives. These benchmarks or indicators are mutually agreed upon by the supervisor and employee at the beginning of the evaluation cycle during the Initial Conference. Once the key responsibilities are identified, the evaluator will examine the employee’s performance on 10 competencies.

Quarterly conferences are optional for newly assigned employees or those who require more specific guidance. These conferences can be requested by the supervisor or employee.

Mid-year conferences will be held to give the employee feedback on his/her performance to date.

At the end of the evaluation cycle, an employee’s performance will be compared to the performance at the beginning of the evaluation period. Evaluators will rate competencies and average these to obtain a final score.
Performance Evaluation Planning and Calendar

<table>
<thead>
<tr>
<th>Date</th>
<th>Action Required</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>STEP 1</strong></td>
<td><strong>Initial Conference</strong></td>
</tr>
<tr>
<td>August 4 – September 30</td>
<td>Initial conferences are held by the supervisor and employee. The supervisor</td>
</tr>
<tr>
<td></td>
<td>and employee will review the complete cycle of the evaluation process together,</td>
</tr>
<tr>
<td></td>
<td>including a review of the competencies, timelines, and documents to be</td>
</tr>
<tr>
<td></td>
<td>completed for each milestone. The Employee Development Plan (EDP), which</td>
</tr>
<tr>
<td></td>
<td>contains 3-5 performance goals the employee plans to accomplish by the end</td>
</tr>
<tr>
<td></td>
<td>of the evaluation cycle, will be created.</td>
</tr>
<tr>
<td><strong>STEP 2</strong></td>
<td></td>
</tr>
<tr>
<td>By October 3</td>
<td>At the conclusion of all Initial Conferences, please submit (hand-deliver or</td>
</tr>
<tr>
<td></td>
<td>through board mail) the Initial Conference and Employee Development Plan</td>
</tr>
<tr>
<td></td>
<td>documents to Human Resources*</td>
</tr>
<tr>
<td><strong>STEP 3 – OPTIONAL</strong></td>
<td><strong>Quarterly Conferences</strong></td>
</tr>
<tr>
<td>Quarter 1: August 4 – October 3</td>
<td>Quarterly conferences may be held for recent or newly assigned personnel</td>
</tr>
<tr>
<td>Quarter 2: October 6 – December 19</td>
<td>or for employees who may require more guidance. These conferences are at</td>
</tr>
<tr>
<td>Quarter 3: January 5 – March 15</td>
<td>the discretion of the supervisors, but may be requested by the employee. It is</td>
</tr>
<tr>
<td>Quarter 4: March 23 – June 12</td>
<td>HIGHLY RECOMMENDED to evaluate employees with performance</td>
</tr>
<tr>
<td></td>
<td>concerns on a quarterly basis. At the conclusion of Quarter 4 Conference,</td>
</tr>
<tr>
<td></td>
<td>please submit all Quarterly Conferences to Human Resources*</td>
</tr>
<tr>
<td><strong>STEP 4</strong></td>
<td><strong>Mid-year Conferences</strong></td>
</tr>
<tr>
<td>January 5 – January 30</td>
<td>Mid-year conferences are held by the supervisor and employee. A review of the</td>
</tr>
<tr>
<td></td>
<td>performance to date, necessary adjustments to key responsibilities, and</td>
</tr>
<tr>
<td></td>
<td>feedback on benchmarks will be discussed.</td>
</tr>
<tr>
<td><strong>STEP 5</strong></td>
<td></td>
</tr>
<tr>
<td>By February 13</td>
<td>At the conclusion of all Mid-year Conferences, please submit (hand-deliver or</td>
</tr>
<tr>
<td></td>
<td>through Board mail) the Mid-year Conference documents to Human Resources*</td>
</tr>
<tr>
<td><strong>STEP 6</strong></td>
<td><strong>Final Summative Conferences</strong></td>
</tr>
<tr>
<td>May 1 – June 12</td>
<td>Final evaluation conferences involve a discussion between the evaluator and</td>
</tr>
<tr>
<td><em>(This conference is held during the last month of a 10 month employee’s year.)</em></td>
<td>employee. The evaluation is signed by both and sent to the Department of</td>
</tr>
<tr>
<td></td>
<td>Human Resources*</td>
</tr>
<tr>
<td><strong>STEP 7</strong></td>
<td></td>
</tr>
<tr>
<td>By June 30</td>
<td>At the conclusion of all Final Summative Conferences, please submit (hand-</td>
</tr>
<tr>
<td></td>
<td>deliver of through Board mail) the Final Summative Conference documents</td>
</tr>
</tbody>
</table>
|                             | to Human Resources.*                                                            *

*Send performance evaluations to:
SCS Department of Human Resources, Barnes Rm 102
c/o Non-Instructional Advisor
Memphis, TN 38112
The Competencies

Employees are evaluated on 10 competencies. The following chart provides a brief explanation of each competency.

<table>
<thead>
<tr>
<th></th>
<th>General Competencies</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Quality of Work</strong></td>
<td>Shows how well the employee knows the duties of the position and how to perform the duties accurately. Include orderliness of work methods, energy and industriousness shown by the employee, and the overall acceptable quality of completed work.</td>
</tr>
<tr>
<td><strong>Quantity of Work</strong></td>
<td>Established by the supervisor according to the necessary and reasonable amount of work required for the job and position (can be found in the job description).</td>
</tr>
<tr>
<td><strong>Dependability</strong></td>
<td>Indicates the ability of the supervisor to rely on the employee with confidence and trust.</td>
</tr>
<tr>
<td><strong>Interpersonal Relations</strong></td>
<td>Describes the employee’s work relationship with other employees, supervisors, administrators and the general public, including parents, community members, and students. Includes telephone, electronic, or verbal communication.</td>
</tr>
<tr>
<td><strong>Initiative</strong></td>
<td>Indicates the ability or instinct of the employee to follow through on a plan or task (begins or assumes tasks that need to be completed without being directed).</td>
</tr>
<tr>
<td><strong>Attendance</strong></td>
<td>Indicates the ability of the employee to be at his/her assigned place of work at the prescribed time and for the duration expected (includes absences, tardies, extended lunches, and other reasons for not being at the assigned place of work).</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th></th>
<th>Job Specific Competencies</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Technical Skill</strong></td>
<td>Indicates the employee’s skills and competencies that relate to the performance of the duties, responsibilities, and tasks assigned. Use the appropriate Skills Set Checklist* OR employee’s Job Description.</td>
</tr>
<tr>
<td><strong>Professional Knowledge</strong></td>
<td>Relates to the employee’s familiarity, awareness, or comprehension acquired through experience, study, or affiliation with organizations in the specific field of endeavor. Use the appropriate Skills Set Checklist OR employee’s Job Description.</td>
</tr>
<tr>
<td><strong>Problem Solving Ability</strong></td>
<td>Indicates the ability of the employee to successfully solve problems that may arise within their area(s) of responsibility. Use the appropriate Skills Set Checklist OR employee’s Job Description.</td>
</tr>
<tr>
<td><strong>Policies, Laws, and Safety</strong></td>
<td>Determines the employee’s ability to adhere to procedures, policies, laws, guidelines, and safety standards established by standard operating procedures, job standards, the district, local, state, or federal laws. Use the appropriate Skills Set Checklist OR employee’s Job Description.</td>
</tr>
</tbody>
</table>

*The Skills Set Checklist can be used as a resource to assist in evaluating job specific competencies. The checklist is not an exhaustive list of duties or responsibilities and does not include all job titles.*
Performance Evaluation Process Steps

STEP 1: Initial Conference

BEFORE THE MEETING

<table>
<thead>
<tr>
<th>Supervisor</th>
<th>Employee</th>
</tr>
</thead>
<tbody>
<tr>
<td>• Notify employee of meeting date.</td>
<td>• Review your Job Description* OR applicable Skills Set Checklist</td>
</tr>
<tr>
<td>• Provide a copy of employee’s Job Description* OR applicable Skills Set Checklist</td>
<td>• Review the Employee Performance Evaluation Protocol manual</td>
</tr>
<tr>
<td>• Provide a copy of the Employee Performance Evaluation Protocol manual</td>
<td></td>
</tr>
</tbody>
</table>

DURING THE MEETING:

<table>
<thead>
<tr>
<th>Supervisor</th>
<th>Employee</th>
</tr>
</thead>
<tbody>
<tr>
<td>• Review the employee’s Job Description* OR applicable Skills Set Checklist</td>
<td>• Ask questions when something is unclear</td>
</tr>
<tr>
<td>• Clarify the top five performance objectives</td>
<td>• Create 3 - 5 performance goals with your supervisor on the Employee Development Plan (EDP)</td>
</tr>
<tr>
<td>• Explain your expectations in each competency</td>
<td>• At the end of this meeting, you should understand your job responsibilities and what your supervisor expects from you</td>
</tr>
<tr>
<td>• Create 3 – 5 performance goals with the employee on the Employee Development Plan (EDP)</td>
<td>• At the end of the meeting, sign and date the Initial Conference form and the EDP form*</td>
</tr>
<tr>
<td>• Sign and date the Initial Conference form and the EDP</td>
<td>• Keep a copy of the Initial Conference form and the EDP form</td>
</tr>
<tr>
<td>• Provide employee with a copy of the Initial Conference form and the EDP form</td>
<td>*Your signature doesn’t mean that you agree. It means that you and your supervisor had this meeting.</td>
</tr>
</tbody>
</table>

*Job Descriptions can be requested from the Department of Compensation

Department of Human Resources

Shelby County Schools offers educational & employment opportunities without regard to race, color, religion, sex, creed, age, disability, national origin, or genetic information.
The Employee Development Plan

- At the beginning of the performance appraisal cycle during the Initial Conference, the employee and supervisor will jointly create three to five performance goals. When setting goals, discuss what measures will be used to determine if the goal was met or not.
- The implementation period for the plan is specified and both employee and supervisor sign and date the plan to verify their acceptance of the EDP.
- Goals must be developed using the framework consisting of SMART: Specific, Measurable, Attainable, Relevant, and Time Limited.*
- At the end of the performance evaluation cycle, indicate whether the EDP goals were met. If the goals were not met, explain the reason for non-achievement.
- **EDP Plans are mandatory for all employees.**

*Example of SMART goal: Decrease the time to resolve customer issues from 2 hours to 1.5 hours by July 2015.

**STEP 2: Submission of Initial Conferences**

At the conclusion of all Initial Conferences, please submit the Initial Conference and Employee Development Plan (EDP) documents to Human Resources (Refer to Performance Evaluation Planning and Calendar).

**STEP 3: Quarterly Evaluation Conferences - OPTIONAL**

Quarterly conferences can be useful management tools to monitor new employees and to provide support for employees who are struggling with performance weaknesses. Quarterly conferences may be informal; however, documentation of the date and discussion of performance objectives should be included on the Quarterly Evaluation Conference form and placed on file for future reference. **Note:** If the employee continues to demonstrate performance issues after the second Quarterly Conference, please contact the Office of Labor and Employee Relations to discuss next steps.

Both the supervisor and employee should retain copies of quarterly conferences. Use the same procedures for Quarterly Conferences as those used for the Mid-year Conference. It is HIGHLY RECOMMENDED to evaluate employees with performance concerns on a quarterly basis.

At the conclusion of Quarter 4 Conference, please submit all Quarterly Conferences to Human Resources (Refer to Performance Evaluation Planning and Calendar).
STEP 4: Mid-year Conference

BEFORE THE MEETING

<table>
<thead>
<tr>
<th>Supervisor</th>
<th>Employee</th>
</tr>
</thead>
<tbody>
<tr>
<td>• Notify employee of meeting date.</td>
<td>• Review the <em>Midyear Conference Evaluation</em> form.</td>
</tr>
<tr>
<td>• Provide employee with a blank copy of the <em>Midyear Conference Evaluation</em> form.</td>
<td>• Think about how you have progressed since the Initial Conference.</td>
</tr>
</tbody>
</table>

DURING THE MEETING:

<table>
<thead>
<tr>
<th>Supervisor</th>
<th>Employee</th>
</tr>
</thead>
<tbody>
<tr>
<td>• Enter Supervisor Ratings, and write comments with specific recommendations (required for marginal/unacceptable performance). *</td>
<td>• Ask for clarification if your supervisor’s scoring reasons are unclear.</td>
</tr>
<tr>
<td>• Sign and date the form.</td>
<td>• At the end of this meeting, you should understand what your supervisor expects from you.</td>
</tr>
<tr>
<td>• Give a copy to the employee.</td>
<td></td>
</tr>
</tbody>
</table>

Required

* Two or more MARGINAL and/or UNACCEPTABLE ratings for the 10 competencies require an Intervention Plan. The plan should be a cooperative venture between the supervisor and the employee. The plan specifies the implementation period. At the end of the implementation period, the employee will submit the Implementation Report to be reviewed by the supervisor. The Implementation Report may be accepted, resulting in the employee’s restoration to the regular Employee Performance Evaluation process. The Implementation Report may be partially accepted, resulting in continuation of the Intervention Plan for further corrective action.

*Note: Please contact the Office of Labor and Employee Relations for all employees assigned to an Intervention Plan to discuss next steps.*

The evaluation process and the progressive discipline process run concurrently, and they may be used together to strengthen and support corrective actions.

STEP 5: Submission of Mid-year Conferences

At the conclusion of all Mid-year Conferences, please submit the Mid-year Conference documents to Human Resources (Refer to Performance Evaluation Planning and Calendar).
STEP 6: Final Summative Conference

This conference will occur between May and mid-June for 12-month employees. For 10-month and 11-month employees, this conference will be held during the last month of the employee’s work year.

BEFORE THE MEETING

<table>
<thead>
<tr>
<th>Supervisor</th>
<th>Employee</th>
</tr>
</thead>
<tbody>
<tr>
<td>• Notify employee of meeting date.</td>
<td>• Enter your top five job performance objectives (#9)</td>
</tr>
<tr>
<td>• Provide employee with a blank Final Conference Summative Report</td>
<td>• Self-score by entering the Employee Ratings for the 10 competencies</td>
</tr>
<tr>
<td>• Ask employee to enter the top five job performance objectives (#9)</td>
<td>• Review your EDP goals and write comments based on the 3-5 performance goals created during the Initial Conference. These comments can be discussed during the conference.</td>
</tr>
<tr>
<td>• Ask employee to enter employee ratings for the 10 competencies.</td>
<td></td>
</tr>
</tbody>
</table>

DURING THE MEETING:

<table>
<thead>
<tr>
<th>Supervisor</th>
<th>Employee</th>
</tr>
</thead>
<tbody>
<tr>
<td>• Review the Skills Set Checklist.</td>
<td>• Explain your EDP goal activities.</td>
</tr>
<tr>
<td>• Enter Supervisor Ratings, and write comments about employee performance.</td>
<td>• Explain your self-scoring.</td>
</tr>
<tr>
<td>• Enter the Final Performance Rating score.</td>
<td>• At the end of the meeting, you should understand your supervisor’s view of your strengths and weaknesses, and expectations for your future performance.</td>
</tr>
<tr>
<td>• Check your Recommendation</td>
<td>• Sign and date the form.*</td>
</tr>
<tr>
<td>• Sign and date the form.</td>
<td></td>
</tr>
<tr>
<td>• Send the original to the Department of Performance Management.</td>
<td></td>
</tr>
<tr>
<td>• Review the EDP and write comments.</td>
<td></td>
</tr>
<tr>
<td>• Place a copy of everything in your school/office employee evaluation files.</td>
<td></td>
</tr>
</tbody>
</table>

STEP 7: Submission of Final Summative Conferences

At the conclusion of all Final Summative Conferences, please submit the Final Summative Conference documents to Human Resources (Refer to Performance Evaluation Planning and Calendar).
Using the Skills Set Checklists

The Skills Set Checklists were designed to support school principals, managers and supervisors in scoring the job-specific competencies (competencies #7 - #10). In cases where an employee has a content specific supervisor who is responsible for maintaining industry standards (i.e., Nutrition Services Supervisors are supervised by a Nutrition Services Area Managers), the Area Managers will be responsible for completing the evaluation; however the school principal may provide feedback on the general competencies (competencies #1 - #6) using the Evaluation Feedback Form. This collaborative performance review will increase communication between school principals and central office administrators to ensure the maintenance of high-quality standards in schools. Building administrators participating in the Final Performance Rating should enter their signature and date on the appropriate line of the Final Summative Conference.

Calculating Supervisor Rating Scores

Supervisors will use the following rating scale to evaluate employee performance.

<table>
<thead>
<tr>
<th>Performance Level</th>
<th>EXPLANATION</th>
</tr>
</thead>
<tbody>
<tr>
<td>5</td>
<td>EXCEPTIONAL PERFORMANCE: Consistently exceeds all position requirements</td>
</tr>
<tr>
<td>4</td>
<td>COMMENDABLE PERFORMANCE: Routinely exceeds most position requirements</td>
</tr>
<tr>
<td>3</td>
<td>SATISFACTORY PERFORMANCE: Consistently meets all position requirements.</td>
</tr>
<tr>
<td>2</td>
<td>MARGINAL PERFORMANCE: Rarely meets position requirements</td>
</tr>
<tr>
<td>1</td>
<td>UNACCEPTABLE PERFORMANCE: Falls below position requirements</td>
</tr>
<tr>
<td>NA</td>
<td>Performance objective does not fall into employee’s area of responsibility or cannot be evaluated at the present time</td>
</tr>
</tbody>
</table>

Comments

Positive written comments provide encouragement and affirmation of an employee’s good performance. Written comments provide documentation of the supervisor’s observations, performance expectations and suggestions for improvements in cases of performance weaknesses.
In addition, employees are encouraged to write comments about their performance as part of preparation for each meeting to be used as discussion points. The evaluator may also use the Intervention Plan (Appendix G) at any point in the evaluation year.

**The Final Performance Rating**

The Final Performance Rating is calculated by adding the supervisor scores for Section IIa (Max 30) Section IIb (Max 20) and dividing the TOTAL by the number of competencies evaluated. If a score was given for all 10 areas, then the TOTAL will be divided by 10. For example, if the TOTAL is 38, the Final Performance Rating will be 3.8.

**Recommendation**

The results are discussed at the Final Evaluation Conference. If the EDP goals weren’t met, they may be extended into the next year. The supervisor may add comments at this point, and the employee may also respond in writing.

Both the evaluator and the employee shall sign and date the final performance evaluation. It does not indicate agreement with the performance evaluation. In the event an employee refuses to sign the evaluation, a witness will be asked to sit in on the evaluation review. The witness will then attest (via signature on the back of the evaluation form) that the performance evaluation was read to the employee being evaluated.

The employee signs and provides the date of the final performance evaluation on the employee line. The evaluator signs and provides the date of the final performance evaluation on the supervisor line. The immediate supervisor above the evaluator is the reviewing authority (Reviewer), and will sign and date on the Reviewer line (i.e., the director and/or department head).

If the final performance rating is less than satisfactory, a copy of the final summative conference and all supporting documentation (progressive disciplinary actions, write-ups, emails, etc.) must be attached to the conference form and submitted to the Department of Labor and Employee Relations.

The evaluator and the employee will retain a copy of the completed employee performance evaluation, and the original will be forwarded to the Department of Human Resources.

Employees who experience a performance evaluation that is considered to be in error, not reflective of their overall performance or inconsistent in the fidelity of the evaluation process should refer to Policy 4055 and follow the suggested procedures.
Appendix A

Employee Performance Evaluation Process Guide
# Employee Performance Evaluation Process Guide

<table>
<thead>
<tr>
<th>Timeline</th>
<th>Component</th>
<th>Action Steps</th>
</tr>
</thead>
<tbody>
<tr>
<td>Aug 4 – Sept 30</td>
<td>STEP 1: Initial Conference</td>
<td>• Complete Initial Conference form&lt;br&gt;• Complete Employee Development Plan (EDP)</td>
</tr>
<tr>
<td>By October 3</td>
<td>STEP 2: Submission of documents</td>
<td>At the conclusion of all employee Initial Conferences, please submit (hand-deliver or through board mail) to the Department of Human Resources*</td>
</tr>
<tr>
<td>Quarter 1:</td>
<td>STEP 3 (OPTIONAL): Quarterly Conference</td>
<td>• Complete Quarterly Conference document for each time period&lt;br&gt;* Quarterly conferences may be held for recent or newly assigned personnel or for employees who may require more guidance. These conferences are at the discretion of the supervisors, but may be requested by the employee. It is HIGHLY RECOMMENDED to evaluate employees with performance concerns on a quarterly basis.</td>
</tr>
<tr>
<td>Aug 4 – Oct 3</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Quarter 2:</td>
<td></td>
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<tr>
<td>Oct 6 – Dec 19</td>
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<tr>
<td>Quarter 3:</td>
<td></td>
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<tr>
<td>Jan 5 – Mar 15</td>
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<tr>
<td>Quarter 4:</td>
<td></td>
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<tr>
<td>Mar 23 – Jun 12</td>
<td></td>
<td></td>
</tr>
<tr>
<td>January 5 – Jan 30</td>
<td>STEP 4: Mid-year Conference</td>
<td>• Complete Mid-year Conference document*&lt;br&gt;* Two or more marginal and/or unacceptable ratings for the 10 competencies requires the completion of an Intervention Plan</td>
</tr>
<tr>
<td>By Feb 13</td>
<td>STEP 5: Submission of documents</td>
<td>At the conclusion of all employee Mid-year Conferences, please submit (hand-deliver or through board mail) to the Department of Human Resources*</td>
</tr>
<tr>
<td>May 1 – Jun 12</td>
<td>STEP 6: Final Summative Conference</td>
<td>• Complete Final Summative Conferences</td>
</tr>
<tr>
<td>By June 30</td>
<td>STEP 7: Submission of documents</td>
<td>At the conclusion of all employee Final Summative Conferences, please submit (hand-deliver or through board mail) to the Department of Human Resources*</td>
</tr>
</tbody>
</table>

*Please send original copies of All conference documents: Initial Conference, Employee Development Plan, Mid-year Conference, Final Conference Summative and Interventions Plan (if applicable) for all non-instructional employees through board mail or hand deliver to:

Shelby County Schools  
Department of Human Resources, Barnes Rm 102  
c/o Non-Instructional Advisor  
160 S. Hollywood Street  
Memphis, TN 38112
Appendix B

Initial Conference Form
Employee Performance Evaluation Process
Shelby County Schools
Initial Conference

Employee: _______________________________  SSN# (last four): __________________________
Principal/Supervisor: _____________________  School/Office: ____________________________

Using either the appropriate Skills Set Checklist or the employee’s Job Description, select the top five Job Performance Objectives and write them below.

<table>
<thead>
<tr>
<th>Job Performance Objectives (Indicators or Benchmarks)</th>
</tr>
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<tbody>
<tr>
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</table>

Provide a brief explanation of content discussed during the Initial Conference (i.e., explanation of the process, review of the competencies, timelines and documents to be completed)

<table>
<thead>
<tr>
<th>Discussion Summary</th>
</tr>
</thead>
<tbody>
<tr>
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</tbody>
</table>

Employee Signature __________________________________________  Date ________________
Supervisor Signature _________________________________________  Date ________________

Department of Human Resources
Shelby County Schools offers educational & employment opportunities without regard to race, color, religion, sex, creed, age, disability, national origin, or genetic information.
**Employee Development Plan (EDP)**

Create 3 – 5 performance goals from the competencies evaluated in this process. Develop **SMART** goals: **Specific**, **Measurable**, **Attainable**, **Relevant**, and **Time Limited**.

<table>
<thead>
<tr>
<th>GOAL</th>
<th>Measure of Success</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
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<tr>
<td></td>
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<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
</tr>
</tbody>
</table>

This Employee Development Plan is accepted for implementation beginning __________ and ending __________

month/year  month/year

Employee __________________ Date ___________ Supervisor __________________ Date ___________

---

**Department of Human Resources**

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Appendix C

Quarterly Evaluation Conference Form (OPTIONAL)
# Employee Performance Evaluation Process

**Shelby County Schools**

**Quarterly Evaluation Conference (OPTIONAL)**

Employee: ____________________________  SSN# (last four): ____________________________

Principal/Supervisor: ____________________________  School/Office: ____________________________

<table>
<thead>
<tr>
<th>Competency</th>
<th>Supervisor Rating</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>1</td>
</tr>
<tr>
<td>1. Quality of Work</td>
<td>Unacceptable</td>
</tr>
<tr>
<td>* How well the employee knows…duties of position</td>
<td></td>
</tr>
<tr>
<td>* How well the employee knows…how to perform duties accurately</td>
<td></td>
</tr>
<tr>
<td>* Orderliness of work methods</td>
<td></td>
</tr>
<tr>
<td>* Displays energy and industriousness</td>
<td></td>
</tr>
<tr>
<td>* Does acceptable work (meets established performance standards; doesn’t produce substandard products or services)</td>
<td></td>
</tr>
<tr>
<td>2. Quantity of Work</td>
<td></td>
</tr>
<tr>
<td>* Established according to the work considered necessary and reasonable for job and position</td>
<td></td>
</tr>
<tr>
<td>* Completes work assignments</td>
<td></td>
</tr>
<tr>
<td>3. Dependability</td>
<td></td>
</tr>
<tr>
<td>* Ability of supervisor to rely on employee</td>
<td></td>
</tr>
<tr>
<td>* Ability of supervisor to trust employee</td>
<td></td>
</tr>
<tr>
<td>4. Interpersonal Relations (Communications)</td>
<td></td>
</tr>
<tr>
<td>* Work relationship with other employees</td>
<td></td>
</tr>
<tr>
<td>* Work relationship with supervisors, administrators</td>
<td></td>
</tr>
<tr>
<td>* Work relationship with general public (parents, students)</td>
<td></td>
</tr>
<tr>
<td>* Telephone, electronic and verbal communication skills</td>
<td></td>
</tr>
<tr>
<td>5. Initiative</td>
<td></td>
</tr>
<tr>
<td>* Ability to follow through on a plan without direction</td>
<td></td>
</tr>
<tr>
<td>6. Attendance</td>
<td></td>
</tr>
<tr>
<td>* Ability to be at assigned place at prescribed time for duration expected</td>
<td></td>
</tr>
<tr>
<td>* Considers absences, tardies, extended lunch, and other reasons for not being at assigned place</td>
<td></td>
</tr>
<tr>
<td>7. Technical Skill</td>
<td></td>
</tr>
<tr>
<td>* Skills Set Checklist OR Job Description</td>
<td></td>
</tr>
<tr>
<td>8. Professional Knowledge</td>
<td></td>
</tr>
<tr>
<td>* Skills Set Checklist OR Job Description</td>
<td></td>
</tr>
<tr>
<td>9. Problem Solving Ability</td>
<td></td>
</tr>
<tr>
<td>* Skills Set Checklist OR Job Description</td>
<td></td>
</tr>
<tr>
<td>10. Adherence to Applicable Policies, Laws, and/or Safety</td>
<td></td>
</tr>
<tr>
<td>* Skills Set Checklist OR Job Description</td>
<td></td>
</tr>
</tbody>
</table>

**Discussion of Performance Objectives:**

Employee Signature ____________________________  Date ____________________________

Supervisor Signature ____________________________  Date ____________________________

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Appendix D

Mid-year Evaluation Conference Form
Employee Performance Evaluation Process  
Shelby County Schools  
**Mid-year Evaluation Conference**

Employee: ____________________________________________  SSN# (last four): ____________________________

Principal/Supervisor: ____________________________  School/Office: ________________

<table>
<thead>
<tr>
<th>Competency</th>
<th>Supervisor Rating</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>1</td>
</tr>
<tr>
<td>1. Quality of Work</td>
<td></td>
</tr>
<tr>
<td>* How well the employee knows… duties of position</td>
<td></td>
</tr>
<tr>
<td>* How well the employee knows… how to perform duties accurately</td>
<td></td>
</tr>
<tr>
<td>* Orderliness of work methods</td>
<td></td>
</tr>
<tr>
<td>* Displays energy and industriousness</td>
<td></td>
</tr>
<tr>
<td>* Does acceptable work (meets established performance standards;</td>
<td></td>
</tr>
</tbody>
</table>
  doesn’t produce substandard products or services)                           |    |    |    |    |    |    |
| 2. Quantity of Work                                                        |    |    |    |    |    |    |
| * Established according to the work considered necessary and reasonable   |    |    |    |    |    |    |
  for job and position                                                       |    |    |    |    |    |    |
| * Completes work assignments                                               |    |    |    |    |    |    |
| 3. Dependability                                                           |    |    |    |    |    |    |
| * Ability of supervisor to rely on employee                                |    |    |    |    |    |    |
| * Ability of supervisor to trust employee                                  |    |    |    |    |    |    |
| 4. Interpersonal Relations (Communications)                                |    |    |    |    |    |    |
| * Work relationship with other employees                                   |    |    |    |    |    |    |
| * Work relationship with supervisors, administrators                       |    |    |    |    |    |    |
| * Work relationship with general public (parents, students)                |    |    |    |    |    |    |
| * Telephone, electronic and verbal communication skills                     |    |    |    |    |    |    |
| 5. Initiative                                                              |    |    |    |    |    |    |
| * Ability to follow through on a plan without direction                    |    |    |    |    |    |    |
| 6. Attendance                                                              |    |    |    |    |    |    |
| * Ability to be at assigned place at prescribed time for duration           |    |    |    |    |    |    |
  expected                                                                  |    |    |    |    |    |    |
| * Considers absences, tardies, extended lunch, and other reasons          |    |    |    |    |    |    |
  for not being at assigned place                                            |    |    |    |    |    |    |
| 7. Technical Skill                                                         |    |    |    |    |    |    |
| * Skills Set Checklist OR Job Description                                  |    |    |    |    |    |    |
| 8. Professional Knowledge                                                  |    |    |    |    |    |    |
| * Skills Set Checklist OR Job Description                                  |    |    |    |    |    |    |
| 9. Problem Solving Ability                                                 |    |    |    |    |    |    |
| * Skills Set Checklist OR Job Description                                  |    |    |    |    |    |    |
| 10. Adherence to Applicable Policies, Laws, and/or Safety                  |    |    |    |    |    |    |
| * Skills Set Checklist OR Job Description                                  |    |    |    |    |    |    |

Discussion of Performance Objectives:

Employee Signature ____________________________  Date ________________

Supervisor Signature ____________________________  Date ________________

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Appendix E

Final Summative Conference Form
Employee Performance Evaluation Process  
Shelby County Schools  
Final Conference Summative Report

**Section I: Employee Information**

1. Review Period: ☐ to ☐  
2. Review Date: ☐

3. Employee Name: ☐
4. Employee Job Title: ☐

5. Supervisor/Principal's Name: ☐
6. School/Office: ☐

7. SSN# (last four digits): ☐

8. Evaluation Type: ☐ Annual ☐ Other (specify) ☐

9. Current Job Performance Objectives (Indicators or Benchmarks)

   ☐

<table>
<thead>
<tr>
<th>Competency</th>
<th>Employee Rating</th>
<th>Supervisor Rating</th>
</tr>
</thead>
<tbody>
<tr>
<td>1. Quality of Work</td>
<td>1 2 3 4 5 NA</td>
<td>1 2 3 4 5 NA</td>
</tr>
<tr>
<td>2. Quantity of Work</td>
<td></td>
<td></td>
</tr>
<tr>
<td>3. Dependability</td>
<td></td>
<td></td>
</tr>
<tr>
<td>4. Interpersonal Relations (Communications)</td>
<td></td>
<td></td>
</tr>
<tr>
<td>5. Initiative</td>
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</tr>
<tr>
<td>6. Attendance</td>
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</table>

Section IIa Score (Max 30)

---

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**Employee Performance Evaluation Process**  
**Shelby County Schools**

**Comments:**

**Quality of Work:**

<table>
<thead>
<tr>
<th>Quantity of Work:</th>
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<tbody>
<tr>
<td>Dependability:</td>
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</table>

<table>
<thead>
<tr>
<th>Interpersonal Relations (Communications):</th>
</tr>
</thead>
<tbody>
<tr>
<td>Initiative:</td>
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</tbody>
</table>

| Attendance: |

*Department of Human Resources*  
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## Section IIb: Job Specific Competencies

<table>
<thead>
<tr>
<th>Competency – Skills Set Checklist</th>
<th>Employee Rating</th>
<th>Supervisor Rating</th>
</tr>
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<tbody>
<tr>
<td></td>
<td>1 2 3 4 5 NA</td>
<td>1 2 3 4 5 NA</td>
</tr>
<tr>
<td>7. Technical Skill</td>
<td></td>
<td></td>
</tr>
<tr>
<td>8. Professional Knowledge</td>
<td></td>
<td></td>
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<tr>
<td>9. Problem Solving Ability</td>
<td></td>
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</tr>
<tr>
<td>10. Adherence to Applicable Policies, Laws, and/or Safety Guidelines</td>
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</table>

**Section IIb Score (Max 20)**

**Comments:**

**Technical Skill:**

**Professional Knowledge:**

**Problem Solving Ability:**

**Adherence to Applicable Policies, Laws, and/or Safety Guidelines:**

---

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Employee Performance Evaluation Process  
Shelby County Schools

Employee: ___________________________  ID #: ___________________________
Principal/Supervisor: ___________________________  School/Office: ____________  

<table>
<thead>
<tr>
<th>Section II Scores Summary</th>
<th>Supervisor Rating</th>
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<tr>
<td>1. Quality of Work</td>
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</tr>
<tr>
<td>2. Quantity of Work</td>
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<td>3. Dependability</td>
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<td>4. Interpersonal Relations (Communications)</td>
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<td>5. Initiative</td>
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<td>6. Attendance</td>
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<tr>
<td><strong>Section IIa Score (Max 30)</strong></td>
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<tr>
<td>7. Technical Skill</td>
<td></td>
</tr>
<tr>
<td>8. Professional Knowledge</td>
<td></td>
</tr>
<tr>
<td>9. Problem Solving Ability</td>
<td></td>
</tr>
<tr>
<td>10. Adherence to Applicable Policies, Laws, and/or Safety Guidelines</td>
<td></td>
</tr>
<tr>
<td><strong>Section IIb Score (Max 20)</strong></td>
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<tr>
<td>TOTAL: Add the Supervisor’s scores for Section IIa and IIb</td>
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<td>Final Performance Rating: Divide the total by the number of competencies evaluated.</td>
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**Employee Development Plan**

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<tr>
<th>Goals Successfully Reached</th>
<th>Yes</th>
<th>No</th>
<th>Partially</th>
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</table>

**NOTE:** If the final performance rating is less than satisfactory, a copy of the final summative conference and all supporting documentation (progressive disciplinary actions, write-ups, emails, etc.) must be attached to the conference form and submitted to the Department of Labor Relations.

**COMMENTS:**

Employee: ___________________________  (Signature and Date)

Supervisor: ___________________________ (Signature and Date)

Reviewer (if applicable): ___________________________  (Signature and Date)

Original to: Human Resources  
Copies: Retain in school/office

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Appendix F

Intervention Plan
Employee Performance Evaluation Process
Shelby County Schools

Intervention Plan

Employee ____________________________ School/Office ____________________________

Area of Weakness (check all that apply)

☐ Quality of work (failure to meet established performance standards; producing substandard products or services)
☐ Quantity of work (failure to complete work assignments)
☐ Dependability
☐ Interpersonal Relations
☐ Initiative
☐ Attendance
☐ Technical Skill
☐ Professional Knowledge
☐ Problem Solving Ability
☐ Adherence to policies, laws and safety guidelines

Problem (describe the performance problem)

Goal (in measurable or observable terms)

Action Plan/Timeline (describe the actions the employee will take to accomplish the goal, including timelines for completion of each action) *If additional space is needed, please attach form to this plan

This Intervention Plan is appropriate for implementation beginning ____________ and ending ____________

Employee ____________________________ Date ____________________________

Supervisor ____________________________ Date ____________________________

Implementation Report

Outcome

☐ The Goal(s) was/were met through the Action Plan: return to regular evaluation cycle
☐ The Goal(s) was/were not met through the Action Plan: continue Intervention Plan

Date Action Plan reviewed: ____________________________ Supervisor ____________________________

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Appendix G

Frequently Asked Questions
Employee Performance Evaluation Protocol
Shelby County Schools

Frequently Asked Questions
Employee Performance Evaluation Protocol

**Employee**

1. **What are the steps in the performance evaluation process?**

   The steps in the process are outlined in the EPEP:
   
   A. Initial Conference
      
      1. Initial Conference form is completed
         
         a. Employee and supervisor review evaluation process (competencies, timelines and documents)
         
         b. Employee and supervisor agree on goals and objectives for the coming year
      
      2. Employee Development Plan (EDP) completed
   
   B. Quarterly Evaluation Conference * – (OPTIONAL)
      
      1. May be held for new personnel or employees who require more guidance
      
      2. May be held at the discretion of the supervisor or requested by employee
   
   C. Mid-year Evaluation Conference *
      
      1. Review of performance to date
      
      2. Feedback provided and/or adjustments made to responsibilities or goals
   
   D. Final Summative Conference
      
      1. Employee reviews skills set checklist and/or job description and competencies
      
      2. Employee completes self-rating
      
      3. Supervisor writes evaluation and discusses with employee
      
      4. Evaluation is signed and submitted to the Department of Human Resources

   * Intervention Plan required for two or more marginal/unacceptable ratings

2. **Who sets my goals and objectives?**

   The employee's goals and objectives are set through a collaborative process between the supervisor and employee. Some may be suggested by the supervisor, and others by the employee. In some departments, an individual's goals grow out of the departmental goal setting process. Goals should be discussed and agreed upon as the initial step in the evaluation process.

3. **What's a goal and what's an objective?**

   A goal is what you are trying to achieve. An objective is what you will do to achieve that goal.
4. **Is there a required format for goals and objectives?**
   No. You can use whatever feels comfortable to you and your supervisor. However, goals must be written as SMART goals (Specific, Measureable, Attainable, Relevant and Time limited)

5. **How general or detailed should goals be? How do I structure realistic goals that leave room for challenges?**
   Goals should be realistic, i.e., practical and achievable. Realistic goals provide a "balance" between what is hard and what is easy to achieve. Goals should motivate people to improve and to reach for attainable ends. For a goal to be motivational, the person must feel that the goal can be achieved. Impossible goals demotivate and defeat the goal-setting process. Likewise, easy goals do not motivate any more than unattainable goals. You should review your goals regularly to check your progress and to make any necessary adjustments.

6. **How are goals and objectives used in the self-evaluation?**
   Your self-evaluation should reflect your progress toward your goals and objectives during the past year. You should describe your successes and discuss why some goals (if any) were not achieved.

7. **How are goals and objectives used by supervisors?**
   The supervisor should include, in their comments on the evaluation, an assessment of the progress you made toward achieving your goals and objectives. That progress, plus compliance with performance standards, should be the major criteria used in judging your performance.

8. **What happens to the goals and objectives you write each year?**
   Your goals and objectives should be retained in the school/office for the upcoming year. You and your supervisor should review your goals and objectives on a regular basis and revise as needed. One copy of the Final Conference Evaluation forms should be retained in the school/departmental office, one copy should be kept for your personal records and the original should be sent to the Department of Human Resources.

9. **When should next year's goals and objectives be developed?**
   They should be developed as the first step in the employee performance evaluation process.

10. **What is the purpose for completing a self-evaluation?**
    You are the person most familiar with your performance. Your self-evaluation allows you to personally reflect on your performance and helps your supervisor gain an accurate picture of your performance during the past year.
11. Why do I give my self-evaluation to my supervisor before my supervisor writes his/her evaluation? Shouldn't we both complete evaluation forms and then meet to discuss them?
Your supervisor should base the evaluation on his or her observations of your performance, plus all available input from other sources. Your own self-evaluation is essential input; to write an objective evaluation, your supervisor should have a record of your accomplishments available. If your supervisor does an evaluation without access to your self-evaluation, he or she will be missing important information.

12. Do I have to use the Employee Performance Evaluation Protocol forms?
Yes, the provided forms are the only official documents to be used throughout the employee performance evaluation process.

13. What does my signature on the Performance Evaluation mean?
The employee's signature indicates that the evaluation form has been reviewed and discussed. It does not necessarily mean that the employee agrees with the evaluation.

Supervisor

1. What are the steps in the performance evaluation process?
The steps in the process are outlined in the EPEP:
   A. Initial Conference
      1. Initial Conference form is completed
         a. Employee and supervisor review evaluation process (competencies, timelines and documents)
         b. Employee and supervisor agree on goals and objectives for the coming year
      2. Employee Development Plan (EDP) completed
   B. Quarterly Evaluation Conference * – (OPTIONAL)
      1. May be held for new personnel or employees who require more guidance
      2. May be held at the discretion of the supervisor or requested by employee
   C. Midyear Evaluation Conference *
      1. Review of performance to date
      2. Feedback provided and/or adjustments made to responsibilities or goals
   D. Final Evaluation Conference
      1. Employee reviews skills set checklist and/or job description and competencies
      2. Employee completes self-rating
      3. Supervisor writes evaluation and discusses with employee
      4. Evaluation is signed and submitted to the Department of Performance Management

* Intervention Plan required for two or more marginal/unsatisfactory ratings
2. What if the supervisor wants the employee to work on a goal, but the employee does not agree?
Every effort should be made to establish goals that both the employee and the supervisor can agree upon. However, at some point the supervisor may require that an employee work towards a goal, even without the employee’s consent. The supervisor should document the goal and objectives/action steps, and have another management employee witness the employee’s refusal to sign the goal form.

3. I have a department of 20 employees who all do the same job. Can we set team goals or the same goal for all employees?
Yes. If all employees are doing the same thing and need to reach the same level of proficiency or performance, establishing the same or similar goal for each employee is appropriate.

4. I have an employee who is always late for work. May we set a goal to be punctual for this employee?
Yes. This is an identified area that this employee needs to work on.

5. What if I want to discipline an employee for behavior that also affects his/her performance?
In this case, keep the documentation in a separate place until the disciplinary process has been concluded. The behavior may be dealt with in both arenas. Initiate discipline as soon as possible after the behavior occurs. Once the disciplinary process has concluded, note the behavior and place any relevant documentation in the employee’s performance file.

6. What responsibility does the supervisor have in writing the evaluation?
The supervisor is responsible for evaluating the employee's performance as objectively as possible, using information from their own observations plus that from other available sources.

7. What if an employee is on disability at the time that they should receive a performance evaluation, do they still receive an evaluation?
The employee would not receive an evaluation until he/she returns to work. At that point, the evaluation cycle will resume the scheduled timeline, allowing adequate periods of time between each scheduled conference.

8. What if the supervisor is out on disability or other approved leave at the time an employee evaluation is due?
The employee would be assigned an interim supervisor or manager and that person would complete the review based on his/her observations and documentation (along with any left by the permanent supervisor).
9. **Do I have to use the Employee Performance Evaluation Protocol forms?**
   Yes. The provided forms are the only official documents to be used throughout the employee performance evaluation process.

10. **What does my signature on the Performance Evaluation mean?**
    The supervisor's signature on the completed evaluation form indicates that this is the supervisor's appraisal of the employee's performance and that the supervisor has discussed it with the employee.
Appendix H
Skills Set Checklist
Skills Set Checklists

<table>
<thead>
<tr>
<th>Position</th>
</tr>
</thead>
<tbody>
<tr>
<td>School Nutrition Supervisor</td>
</tr>
<tr>
<td>Plant Manager</td>
</tr>
<tr>
<td>School Secretary</td>
</tr>
<tr>
<td>Educational Assistant</td>
</tr>
<tr>
<td>Bilingual Cultural Mentor</td>
</tr>
<tr>
<td>ISS Assistant</td>
</tr>
<tr>
<td>Behavior Analyst</td>
</tr>
<tr>
<td>Fiscal Assistant</td>
</tr>
<tr>
<td>Payroll/Budget/Accounting Associate/Manager</td>
</tr>
<tr>
<td>Family &amp; Community Engagement</td>
</tr>
<tr>
<td>School Tech Specialist</td>
</tr>
<tr>
<td>Marketing-Media Advisor</td>
</tr>
<tr>
<td>Executive Assistant</td>
</tr>
<tr>
<td>Administrative Assistant</td>
</tr>
<tr>
<td>Family Resource Center Associate</td>
</tr>
<tr>
<td>Family Engagement Specialist</td>
</tr>
<tr>
<td>Receptionist</td>
</tr>
<tr>
<td>Director – Parent Engagement and Student Support</td>
</tr>
<tr>
<td>Research Analyst</td>
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<tr>
<td>Administrative Assistant</td>
</tr>
<tr>
<td>Executive Assistant</td>
</tr>
<tr>
<td>Content Instructional Advisors</td>
</tr>
</tbody>
</table>
7. Technical Skill
   _____ Plan and direct the preparation and serving of all food in the cafeteria.
   _____ Inspect all areas of the cafeteria.
   _____ Inventory and order food and supplies to ensure adequate food and supplies are available for meals.
   _____ Account for all monies received and report accurate information.
   _____ Test and evaluate foods or food items with student and staff participation.
   _____ Secure all revenues, deposits, and opening change.

8. Professional Knowledge
   _____ Assign, direct, plan, supervise and monitor the work of cafeteria employees.
   _____ Evaluate employees and use progressive discipline if needed.
   _____ Meet with student groups and participate in NAC and TEAM Nutrition activities.
   _____ Instruct new employees on acceptable practices for preparation, service, cleaning and sanitation.
       - Provide continuous training enforcement.
   _____ Inspect food and supplies when received for quality, count, weight and price.
   _____ Plan and conduct staff meetings.
   _____ Promote cafeteria programs through continuous marketing and management strategies.

9. Problem Solving
   _____ Evaluate meal acceptance by customers and report to Central Office.
   _____ Ensure that good customer relations techniques are followed daily.
   _____ Meet periodically with principal and staff.
   _____ Foster pleasant and conducive atmosphere for effective work.

    _____ Ensure conformance to all approved safety and sanitation practices of Memphis and Shelby County Health Dept.
    _____ Prepare daily required reports accurately to reflect meals claimed.
    _____ Follow all acceptable accounting principles to ensure cafeteria is fiscally sound.
    _____ Ensure that established food quality standards are met.
    _____ Utilize food and supplies according to standard procedures.
    _____ Prepare time sheets and submit to appropriate department.
### Plant Manager

<table>
<thead>
<tr>
<th>1 Unacceptable</th>
<th>2 Marginal</th>
<th>3 Satisfactory</th>
<th>4 Commendable</th>
<th>5 Exceptional</th>
<th>NA</th>
</tr>
</thead>
</table>

#### 7. Technical Skill

- Instructs subordinate custodial workers in proper custodial methods and use of new equipment.
- Ensures cleaning chemicals are properly mixed prior for use by subordinate custodial workers.
- Supervises and participates in the periodic check of lighting, including replacement of bulbs, fluorescent tubes, etc.
- Maintains proper heating and air conditioning of building.
- Provides routine service of heating and air conditioning equipment (cleaning, replacing filters)
- Keeps equipment rooms clean, painted and litter free.

#### 8. Professional Knowledge

- Directly participates in the performance of scheduled work activities.
- Develops work schedules; assigns, supervises, and inspects the work of custodial personnel engaged in keeping building, equipment and premises in a clean, orderly condition.
- Ensures that all scheduled housekeeping projects are carried out. (buffing floors, washing windows, etc.)
- Keeps Daily Journal.
- Trains subordinates in proper maintenance and preventative maintenance procedures.

#### 9. Problem Solving

- Reports immediately to the Principal any accident involving custodial staff personnel, any unmanageable problems beyond his/her scope of responsibility associated with maintenance, safety, security or custodial staff. Ensures subordinates comply with rules and regulations.
- Acts on and resolves staff-related problems. Determines that the custodial staff is adequately utilized.
- Ensures equipment is clean and stored at the end of each shift.
- Seeks technical assistance from Custodial Operations as appropriate.
- Reports immediately to the principal any unmanageable problem associated with maintenance, safety, security or custodial staff.
- Acts as liaison for requests for skilled repairs in emergencies or as routine maintenance work is required.


- Prepares and submits all required reports in a timely manner and in a condition of completeness. Keeps accurate time and leave records for custodial staff.
- Ensures that all lights have been turned off and the building has been secured.
- Turns heating, air conditioning, and other equipment on and off as required.
- Performs monthly, quarterly and as required preventative maintenance checks as identified by Plant Maintenance.
- Performs Daily Rounds Routines as identified by Plant Maintenance.
7. Technical Skill
____ Maintains files in an updated, easily retrievable and neat manner.
____ Answers phones and emails regarding questions and information related to the school; responds to questions and issues and/or screens calls for administrators’ response.
____ Creates databases and prepares various reports.
____ Responsible for the accurate and timely financial accounting activity of the school, including employees’ payroll, receipt of monies, requisitions, and other financial bookkeeping.

8. Professional Knowledge
____ Provides clerical support for the day-to-day operations of the school including preparing correspondence as directed.
____ Schedules appointments for administrators and prepares for meetings as requested.
____ Ensures documentations filed and paperwork processed in a timely manner.
____ Edits written material for correct grammar, punctuation and legibility.
____ Builds a positive climate that fosters high morale.
____ Organizes work station in a safe and productive manner.
____ Makes an effort to improve skills and acquire knowledge relative to job responsibilities.

9. Problem Solving
____ Works effectively with others; demonstrates willingness to assist others.
____ Utilizes tact and discretion in sensitive situations
____ Exhibits a positive rapport with customers and promotes these services in a professional manner.
____ Achieves results by promoting teamwork and directing others effectively.
____ Adjusts personal schedule to meet emergency work load.
____ Assists students, parents and staff members with problems or emergencies.

____ Complies with SCS policies, procedures and guidelines.
____ Ensures a high level of confidentiality concerning student records and information.
____ Maintains appropriate documentation for all expenditures and school activities.
____ Monitors site-based budget to assure funds are available.
Employee Performance Evaluation Protocol
Shelby County Schools

## Educational Assistant

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### 7. Technical Skill
- ■ Assists with the maintenance of student records as instructed by the supervising teacher.
- ■ Checks and record student attendance.
- ■ Turns in records and reports that are complete, accurate and neat.
- ■ Uses oral communications that are clear and grammatically correct.
- ■ Follows directions of regular teachers.
- ■ Provides regular teachers with informal progress reports as required.

### 8. Professional Knowledge
- ■ Helps students master instructional materials assigned by the teacher.
- ■ Assists in preparing needed materials and supplies for the learning environment.
- ■ Supervises the classroom when the teacher is out of the room.
- ■ Demonstrates knowledge and skills required to complete as assigned duties and responsibilities.
- ■ Tutors individual students or small groups of students in accordance with instructions.
- ■ Supports the Instructional and non-instructional efforts of teachers in meeting student performance objectives.
- ■ Makes an effort to improve skills and acquire knowledge relative to job responsibilities.

### 9. Problem Solving
- ■ Maintains self-control in frustrating and difficult situations.
- ■ Identifies and analyzes new or emergency situations and makes effective decisions.
- ■ Works under the stress of multiple activities.
- ■ Offers useful suggestions to improve instruction, student behavior, learning environment and solve problems.
- ■ Presents a positive personal image in appearance and clothing is job appropriate.

### 10. Policies, Laws, and Safety
- ■ Assists with loading and unloading students from buses.
- ■ Assists with cafeteria duties.
- ■ Assists with the supervision of students during emergency drills, assemblies, play periods and field trips.
- ■ Supervises restroom breaks.
- ■ Complies with board policy, superintendent’s regulations and school or unit regulations.
- ■ Effectively provides assistance to meet the personal and private needs of special students
### Bilingual Cultural Mentor

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#### 7. Technical Skill

_____ Collaborates and communicates regularly with classroom/ESL teachers, principal, parents and other school staff about ELL students’ progress and needs.

_____ Collaborates with school staff to keep parents informed of the ELL students’ needs and progress by phone calls, home visits and/or parent conferences.

#### 8. Professional Knowledge

_____ Supplements and reinforces curriculum standards by working with ELL students individually or in small groups according to their needs in English and content area courses utilizing district approved materials.

_____ Collaborates with school staff to provide training to the parents of non-English language background students.

_____ Provides written and oral translations and/or requests for additional interpreters as requested by school staff and/or parents.

#### 9. Problem Solving

_____ Serves as a resource person for school staff on specific cultural issues.

_____ Performs other duties as required.


_____ Assists the schools and the ESL Program in collecting and generating the necessary data for school and program evaluations and reports.

_____ Assists in the development of students’ understanding and appreciation of their native culture and American culture.
ISS Assistant

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7. **Technical Skill**

_____ Coordinates instructional activities with classroom teachers of students referred to in-school suspension.

_____ Monitors students’ regular academic work while in in-school suspension.

_____ Monitors student progress following the student’s return to the regular classroom.

8. **Professional Knowledge**

_____ Provides tutorial assistance to students assigned to in-school suspension.

_____ Works collaboratively with school and district team members to meet the academic, affective, and behavioral needs of students.

_____ Participates in school and district training.

9. **Problem Solving**

_____ Works with other team members to implement procedures to assist students in the development of techniques to control and express anger constructively, encourage positive student behavior, and promote safety in the school.

_____ Assigns and oversees special assignments related to the students’ infractions.

10. **Policies, Laws, and Safety**

_____ Contacts parents regarding student conduct and provides parents with appropriate behavior modification plans.

_____ Keeps clear and accurate documentation and records in regards to student data.
### Behavior Analyst

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**7. Technical Skill**
- _____ Develops and monitors behavior intervention plans.
- _____ Assists with alternative student transitions.
- _____ Assists with ISS repeat offenders.
- _____ Assists in design and administration of evaluation process and measurement of outcomes.

**8. Professional Knowledge**
- _____ Implements positive, assessment-based interventions for students with identified behavior problems.
- _____ Provides consultation, training and demonstrations to classroom teachers in the development of facilitative environments and risk reduction strategies.
- _____ Assists teachers in reducing/eliminating use of punitive interventions.
- _____ Models successful intervention strategies in a classroom setting.
- _____ Adheres to the district approved professional development schedule.

**9. Problem Solving**
- _____ Collaborates with Blue Ribbon/Discipline Teams to address school climate.
- _____ Consults with Principal/AP as necessary regarding the program.

- _____ Monitors data for 20-day report.
- _____ Assists with the S-team Process.
- _____ Completes all forms related to the implementation and evaluation of the program.
Employee Performance Evaluation Protocol  
Shelby County Schools

Fiscal Assistant

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7. **Technical Skill**

- Uses automated machines and computer software packages used in the department
- Opens, dates and distributes department mail.
- Enters data and files journal vouchers, payroll records and purchase orders.
- Reviews and processes district travel.

8. **Professional Knowledge**

- Processes and pays invoices, both purchase orders and direct payments.
- Processes and distributes all checks (Payroll and Accounts Payable)
- Maintains and updates vendor files in current status.

9. **Problem Solving**

- Reconciles vendor statements, financial records, and payroll records.
- Communicates effectively with the general public.
- Works effectively with school and administrative personnel.

10. **Policies, Laws, and Safety**

- Processes all deductions for various governmental agencies and private companies.
- Prepares contracts, performance bonds, purchase orders, bids and requests for prices.
Payroll/Budget/Accounting Associate

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7. **Technical Skill**

- Prepares monthly and other business reports requiring knowledge of spreadsheet software to recap figures and balance reports.
- Maintain database of various financial information for reporting purposes.
- Performs a wide variety of clerical/accounting tasks that may involve basic math techniques.

8. **Professional Knowledge**

- Conducts periodic and monthly analysis and reconciliation of account (s).
- Audits financial and various other reports to ensure accuracy.
- Designs and implements training for finance clerks.
- Substitutes during absence of clerical staff.
- Supervises clerical staff.
- Conducts initial performance reviews; interviews and recommends the hiring of new employees.

9. **Problem Solving**

- Reviews, researches, and resolves errors and discrepancies by analysis of various reports and data.
- Responds to and corrects all inquiries and problems received in the department within a reasonable time.
- Communicates effectively to all school and administrative personnel.
- Relates effectively with the general public.

10. **Policies, Laws, and Safety**

- Maintains confidentiality when accessing AP/GL/PO Walker/Information system (financial files) and CYBORG (payroll system).
Employee Performance Evaluation Protocol
Shelby County Schools

School Tech Specialist

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7. Technical Skill

______ Serves as a lead computer support technician and troubleshooter for school technology environment.

______ Provides technical support to customers in the schools and School Technical Specialist I.

______ Supports hardware and networking equipment both administrative and classroom.

______ Maintains adequate tracking system to account for daily problem resolutions and/or recommendations for resolution.

______ Performs maintenance upgrades as necessary to ensure currency.

______ Prepares computers for designated employees, loads appropriate software and operating system.

8. Professional Knowledge

______ Conducts customer training sessions.

______ Assists in training of School Technical Specialist I.

______ Provides direction, support and mentoring for School Technical Specialist I.

______ Pursues formal and informal training opportunities to upgrade skills and knowledge

______ Participates in all staff development/training developed for technical specialists..

9. Problem Solving

______ Escalates unresolved problems to appropriate personnel.

______ Analyzes problems and makes appropriate recommendations for upgrades, repairs, replacement, etc.

______ Identifies recurrent problems and assists customers in resolution.

______ Communicates effectively with customers, peers and management.

______ Implements ideas for improved efficiency and effectiveness.


______ Adheres to District standards and procedures relating to computer hardware, software and vendor agreements.

______ Follows established security procedures.

______ Adheres to established procedures, policies and standards of the District.
Employee Performance Evaluation Protocol
Shelby County Schools

Family Resource Center Associate/Manager

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7. Technical Skill

___ Coordinates schedules, records and assessments of agency personnel and volunteers.
___ Maintains a current multiple data file of internal and external contacts that provide supportive resources and services to families.
___ Ensures the coordination of all FRC reports and records.
___ Maintains equipment and property.
___ Monitors project budget.

8. Professional Knowledge

___ Designs, develops, and plans program components in collaboration with the FRC advisory council.
___ Organizes and implements all components of the project.
___ Communicates the goals and objectives of the project to various groups and service providers.
___ Accepts responsibility for planning six months to one year in advance.
___ Develops project proposals and documentation for program’s evaluation.
___ Plans, develops and facilitates workshops and information sessions for families, school personnel, and community support groups that foster student success.
___ Develops, facilitates and implements activities designed to assist families in developing tools and strategies to help children achieve success in school and in the community.

9. Problem Solving

___ Conducts assessments and surveys periodically to determine problems impacting student achievement.
___ Integrates and coordinates preventive services and basic supports for families preschool and school age children.


___ Maintains current accurate records as required by law, policy and administrative regulations.
___ Follows established security procedures.
___ Adheres to established procedures, policies and standards of the District.

Shelby County Schools offers educational & employment opportunities without regard to race, color, religion, sex, creed, age, disability, national origin, or genetic information.
Family Engagement Specialist

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7. Technical Skill

_____ Gathers community resources information for parents of Title I children.
_____ Plans, organizes and facilitates daily work plans.
_____ Effectively operates office and computer equipment.
_____ Uses Microsoft Office with proficiency.

8. Professional Knowledge

_____ Eliminates barriers that interfere with getting positive results for all children.
_____ Provides professional development for faculty and staff in working with parents.
_____ Assists in linking parents with medical, social and educational information.

9. Problem Solving

_____ Collaborates with parents, principals, teachers and support staff.
_____ Collaborates with community action agencies.


_____ Promotes the district’s goal of creating safe welcoming learning environments.
_____ Follows established security procedures.
_____ Adheres to established procedures, policies and standards of the District.
Clerk/Receptionist

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7. Technical Skill

_____ Receives and sorts correspondence and routes as appropriate.
_____ Operates various office equipment and computers.
_____ Uses Microsoft Office and MS Word proficiently.

8. Professional Knowledge

_____ Answers multi-line telephone calls, receives inquiries, furnishes routine information, handles complaints and refers calls to proper staff.
_____ Acts as receptionist and directs visitors and employees to proper staff or office.
_____ Prepares reports, materials, and other needed information as requested.
_____ Files and retrieves documents, reports and other paperwork.
_____ Assures materials/mail promptly distributed for staff to avoid untimely responses that may have monetary effect.

9. Problem Solving

_____ Communicates effectively with employees and customers, and other divisions.
_____ Communicates effectively with parents, customers and community agencies.
_____ Handles difficult situations in a courteous and professional manner.


_____ Maintains confidentiality of business conducted in the department.
_____ Follows established security procedures.
_____ Adheres to established procedures, policies and standards of the District.
Research Analyst

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7. **Technical Skill**
   ___ Assists program staff in the accumulation and correlation of data for required reports for special projects and grants, and prepares and submits required financial reports.
   ___ Monitors implementation and payment of service contracts for division equipment.
   ___ Monitors local and out-of-town travel for the division.
   ___ Monitors all budgets within the Division of Parental Involvement and Family Support.
   ___ Monitors expenditures for Division’s administrative budget.

8. **Professional Knowledge**
   ___ Plans and prepares annual budgets; analyzes previous year’s spending trends to determine best placement of money for division program needs and to meet division goals.
   ___ Reviews and monitors expenditures for fund 1, fund 4 and fund 6 (special revenue budgets); works closely with supervisory staff in monitoring individual program budgets to ensure that expenses are in alignment with the budget projections/specification and that corrections/changes are made in a timely manner.
   ___ Reconciles budget reports with expenditures and prepares periodic reports showing budget status for the division director, supervisory staff, and/or program personnel.
   ___ Develops budgets to support the programs and specials projects outlined within grants and grant proposals.

9. **Problem Solving**
   ___ Clarifies, interprets and monitors grant regulations/contracts as they relate to fiscal obligations and reporting cycles.
   ___ Assists supervisory staff in monitoring expenditures for various Federal and State program budgets.

10. **Policies, Laws, and Safety**
    ___ Interacts with divisional supervisory staff, program staff/teachers, staff in Human Resources, Fiscal Services, No Child Left Behind, accounts Payable, Internal Auditing and Procurement services in the monitoring of expenditures and payment of personnel.
    ___ Interacts with outside vendors who provide services or materials/supplies for divisional programs.
    ___ Adheres to established procedures, policies and standards of the District.
Employee Performance Evaluation Protocol
Shelby County Schools

Administrative Assistant

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7. Technical Skill

___ Process requisitions.
___ Process Travel Authorizations and Expense Reports for Special Project Coordinator.
___ Communicate with the public regarding classes offered at the Parental Involvement Center.
___ Manage workshop reservations and catering requests for workshops.
___ Effectively use all computer software in the office.
___ Receive and resolve parental involvement telephone calls and take messages.
___ Make copies, transparencies and faxes as needed.

8. Professional Knowledge

___ Make arrangements and preparations for monthly parent workshops.
___ Make arrangements and preparations for parent advisory council members and parent counselor meetings.
___ Manage supplies and materials inventories and order when needed from various vendors.
___ Communicate with Title I principals, Instructional Facilitators, school secretaries, finance, purchasing and accounts payable.
___ Design and create specialized forms, agendas, flyers, sign-ins and evaluations for workshops.
___ Manage Parental Involvement Center operational budget.
___ Type letters, memos, handbooks, etc.
___ Prepare materials for summer school.
___ Make hotel and flight reservations for coordinator, parent advisory council members and parent counselors.

9. Problem Solving

___ Acquires incentive gifts for parents.
___ Maintains office and duties in the absence of coordinator.


___ Maintains critical and confidential information.
___ Adheres to established procedures, policies and standards of the District.
## Executive Assistant

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### 7. Technical Skill
- Serves as clerical support for the administrator.
- Schedules meetings and notifications.
- Files and retrieves documents, personnel files, reports and other paperwork; prepares and distributes reports and disseminates information to appropriate staff.

### 8. Professional Knowledge
- Schedules hearings, prepares files, responses and completes planning logistics for meetings as needed.
- Attends meetings, prepares notes, prepares memos, and handles filing.
- Manages all communication for the division administrator.
- Prepares correspondence and presentations.
- Develops, creates and maintains division databases as needed.
- Supervises clerical support as needed.

### 9. Problem Solving
- Responds to customers regarding areas as directed.
- Manages supplies, requisitions, and payroll
- Communicates internally with other departments and staff of SCS, and externally with community and educational sources.

### 10. Policies, Laws, and Safety
- Maintains critical and confidential information including personnel files, evaluations, records and compensation data.
- Adheres to established procedures, policies and standards of the District.
### Instructional Advisor/Curriculum Coordinator

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#### 7. Technical Skill

- Develop guidelines for the selection of standards-based curriculum and instructional materials/resources for science and/or mathematics.
- Conduct ongoing monitoring/observation of classroom instructional practices for alignment consistent with the implementation of the SCS Curriculum Guides.
- Conduct observations at assigned schools and provide written feedback to principals and district administrators.

#### 8. Professional Knowledge

- Review and recommend a variety of standards-based mathematics and/or science curricula based on district standards.
- Conduct demonstration lessons to model instructional practices (including the use of technology) which promote student learning through standards-based instruction.
- Conduct demonstrations to model the use of alternative/performance-based assessments linked to district life-long and mathematics and/or science standards.

#### 9. Problem Solving

- Monitor the implementation of standards-based curricula and provide support to improve implementation.
- Assist in the establishment of a clearinghouse of instructional performance assessments for use by K-12 teachers district wide.
- Conduct group sessions with lead teachers to discuss and review performance-based assessment strategies for the school improvement plan.
- Communicate effectively with administrators, teachers, instructional staff and parents/guardians.


- Collaborate with Director, facilitators, and others to design and plan district level professional development.
- Co-plan and implement district level and local school activities that involve parents, policy makers, institutions of higher education, business and industry, and other segments of the community in the support of student achievement.
7. Technical Skill
   _____ Serves as clerical support for the administrator.
   _____ Schedules meetings, prepares files, and completes planning logistics for
   meetings as needed.
   _____ Maintains payroll, attendance, vacation and other records.
   _____ Files and retrieves documents, personnel files, reports and other paperwork;
   prepares and distributes reports and disseminates information to appropriate
   staff.
   _____ Uses office equipment proficiently, including word processing, computers,
   calculators, adding machines, copy machines, and any other office equipment.
   _____ Uses all office software proficiently, and learns any new software acquired by the office.

8. Professional Knowledge
   _____ Attends meetings, prepares notes, creates memos from discussions, generates draft
   reports, and handles filing.
   _____ Manages all communication for the division administrator.
   _____ Prepares correspondence and presentations.
   _____ Develops, creates and maintains division databases as needed.
   _____ Assists with preparation and monitoring of the budget.
   _____ Supervises clerical support as needed.

9. Problem Solving
   _____ Responds to customers regarding areas as directed.
   _____ Manages supplies, requisitions, and payroll
   _____ Communicates internally with other departments and staff of SCS, and
   externally with community and educational sources.

    _____ Maintains critical and confidential information including personnel files,
    evaluations, records and compensation data.
    _____ Adheres to established procedures, policies and standards of the District.
Employee Performance Evaluation Process
Shelby County Schools