



<https://tinyurl.com/OHCSchoolLeaderHandbook>

# OHC Handbook for School Leaders

## School Year 2018-2019

This handbook is intended to serve as a resource for school leaders. The information contained in this handbook will be updated on an ongoing basis. Any feedback on its contents is welcomed.

Please contact your OHC Manager with any questions or comments.

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## General Information

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- [Key Dates and Timelines](#)

### Contacts and Liaison Assignments:

[OHC Contact List](#)

[Human Capital Manager and Coordinator School Assignments 2017-2018](#) (*Please note this will change in the coming months given the recent reorganization*)

### OHC Teams and Key Roles:

Staffing (School Support) Team	
HC Manager	<p><b>Contact your HC Manager if you are seeking...</b></p> <ul style="list-style-type: none"><li>• Support in recruiting, developing, and retaining the most effective talent</li><li>• Answers to any human capital-related questions or requests</li><li>• Support in preparing for your Probable Organization meeting</li><li>• Data regarding educator licensure, staff performance, and attendance</li><li>• Help understanding and navigating district &amp; union policies related to staffing or evaluation</li></ul>
Coordinator	<p><b>Your Coordinator works to...</b></p> <ul style="list-style-type: none"><li>• Ensure that of your teachers and staff are in position, cleared to start work, &amp; paid in a timely fashion</li><li>• Support teachers &amp; staff with any human capital-related questions</li><li>• Manage the background check process (fingerprinting, CORIs)</li><li>• Hire secretaries, lunch monitors, bus monitors, and summer staff</li><li>• Approve over-time and stipend requests (PS08)</li></ul>

For More Resources & Some Self-Service Resources, please see [Hiring Support: Menu of Supports & Resources](#)

Performance Management Team (PMT)	
Performance Management Partner	<p><b>Contact your OHC PMT Partner if you are seeking...</b></p> <ul style="list-style-type: none"> <li>• Support, guidance, and feedback related to your evaluations and evaluation processes</li> <li>• Professional development for your staff around evaluation, calibration, supporting educators through coaching and feedback.</li> </ul> <p>Contact: <a href="mailto:eval@bostonpublicschools.org">eval@bostonpublicschools.org</a> with general evaluation inquiries</p>
Professional Growth Specialist (PGS)	<p><b>Contact a PGS if you are seeking...</b></p> <ul style="list-style-type: none"> <li>• More information about the Suitable Professional Capacity program</li> <li>• See <a href="#">Guidelines</a> for school leaders hosting SPC educators</li> <li>• Support with underperforming teachers</li> </ul> <p>Contact: <a href="mailto:internalcandidatesupport@bostonpublicschools.org">internalcandidatesupport@bostonpublicschools.org</a> with general inquiries about SPC</p>

Other OHC Teams	
Payroll	Employee Services/Human Capital Information Systems
<p><b>Supports with...</b></p> <ul style="list-style-type: none"> <li>- Any pay-related questions or issues such as:</li> <li>-Gross earnings questions</li> <li>-Earnings adjustments</li> <li>-Audits (i.e. time reporting &amp; payroll)</li> <li>-PS09 Stipends</li> <li>-Absence management(i.e. reporting and approving time off requests</li> <li>-Employment verifications</li> </ul>	<p><b>Supports with...</b></p> <ul style="list-style-type: none"> <li>- Leave requests</li> <li>- Workman’s compensation</li> <li>- Tuition reimbursements</li> <li>- Resignations &amp; retirements</li> <li>- Step, lane, grade changes</li> <li>- Career awards</li> <li>- Employment and licensure verifications</li> <li>- Absence management (i.e. leave entitlements)</li> <li>- Seniority</li> </ul>
Data	Sub Central
<p><b>Supports with...</b></p> <ul style="list-style-type: none"> <li>- Annual staffing profiles</li> <li>- Diversity data</li> <li>- Evaluation completion trackers</li> </ul>	<p><b>Supports with...</b></p> <ul style="list-style-type: none"> <li>- Recruitment, hiring, and assignment of per diem and long term substitutes</li> </ul>

<p>Recruitment Cultivation and Diversity Programs <b>Pipeline Programs</b></p>	<p>Recruitment Cultivation and Diversity Programs <b>Retention and Development</b></p>
<p><b>Supports with...</b></p> <p>The development of home grown educator talent pool:</p> <p><b>Teacher Pipeline Development:</b></p> <ul style="list-style-type: none"> <li>• The BPS Accelerated Community to Teacher <a href="#">Program</a></li> <li>• The <a href="#">BPS Teaching Fellowship Program</a></li> </ul> <p><b>Educator Cultivation Pipeline Development</b></p> <ul style="list-style-type: none"> <li>• The BPS High School to Teacher <a href="#">Program</a></li> <li>• The BPS Community Paraprofessional Development <a href="#">Program</a></li> </ul>	<p><b>Supports with...</b></p> <p><b>Both Retention and Development strategies and programming for all BPS Educators:</b></p> <p>BPS Office of Human Capital SY 18-19 Recruitment, Cultivation &amp; Diversity Programs Retention Strategies</p> <p>The BPS/UMASS Boston Educational Administration Satellite Graduate <a href="#">Program</a> (Available for <u>ALL</u> BPS employees)</p>
<p>Recruitment Cultivation and Diversity Programs <b>Recruitment</b></p>	<p>Recruitment Cultivation and Diversity Programs <b>New Teacher Development (NTD)</b></p>
<p><b>Supports with...</b></p> <p>To be updated:</p> <ul style="list-style-type: none"> <li>- District-wide recruitment efforts</li> <li>- Recruitment events</li> <li>- Cultivating a strong priority pool</li> </ul>	<p><b>Supports with...</b></p> <ul style="list-style-type: none"> <li>-<a href="#">Novice teacher induction mentoring in year 1</a></li> <li>-Mentoring support to teachers in years 2 &amp; 3 seeking professional licensure through <a href="#">BPSOM</a></li> <li>-Part-time NTD professional learning and support</li> <li>-Programming for <a href="#">BPS Teaching Fellowship Program</a></li> </ul>
<p>Recruitment Cultivation and Diversity Programs <b>Diversity Programs</b></p>	<p>Recruitment Cultivation and Diversity Programs <b>Licensure Support</b></p>
<p><b>Supports with...</b></p> <p>Retention and Development programming for educators of color</p> <ul style="list-style-type: none"> <li>-The BPS ALANA (African, Latino, Asian and Native American) Educators Program (<a href="#">ALANA</a>)</li> <li>-The BPS Women Educator of Color Executive Coaching Program(<a href="#">WEOC</a>)</li> <li>- The BPS Male Educator of Color Executive Coaching Program (<a href="#">MEOC</a>)</li> </ul>	<p><b>Supports with...</b></p> <p>MTEL Prep support and ESL and Special Education Certification</p> <ul style="list-style-type: none"> <li>- District-wide MTEL Prep Licensure and Support - To request information - <a href="mailto:mtelprepsupport@bostonpublicschools.org">mtelprepsupport@bostonpublicschools.org</a></li> <li>- Moderate Disabilities Severe Disabilities and ESL Pathways - Nick Balasalle Ed.D - <a href="mailto:nbalasalle@bostonpublicschools.org">nbalasalle@bostonpublicschools.org</a></li> </ul>

**Contracts and Circulars:**

**Bargaining Unit Contracts:**

- [BTU](#)- 2010-2016 Teacher and Paraprofessional contract
- [Guild](#)- 2013-2016 Administrative Guild (school secretary) contract
- [BASAS](#)- 2013-2016 Boston Association of School Administrators contract
- [Lunch Monitors](#)- 2010-2016 Lunch Hours Monitor association contract
- [Custodial Staff](#)- 2010-2016 Painters and Allied Trades contract

**Superintendent Staffing Circulars:**

- Managerial Conditions of Employment: *Superintendent Circular HRS-HS-5*
- Staffing, Reassignment, and Hiring of Teachers: *Superintendent Circular HRS-HS-7*
- Teacher Licensure and NCLB Requirements: *Superintendent Circular HRS-L1*
- Attendance Monitoring System: *Superintendent Circular HRS-PP05*
- Criminal History Screening: *Superintendent Circular HRS-PP9*
- Absence and Leave Policy: *Superintendent Circular HRS-PP13*
- Employee Resignation, Retirement, and Separations: *Superintendent Circular HRS-PP17*
- Performance-Related Dismissal Process for Teachers: *Superintendent Circular HRS-PP19*

**Key Dates and Timelines**

- 1) [BPS Calendar 2018-19](#)
- 2) Summer institute dates for leaders, new teachers, and secretaries

Employee Type	Institute
August Leadership Institute	8/14/2018 - 8/16/2018
Guild Institute	8/14/2018 - 8/15/2018
Teacher Summer Institute	8/20/2018- 8/22/2018

- 3) Start dates for employee groups

*Each employee type has a distinct start date which impacts when they report to work:*

Employee Type	Start Date
New Teachers	8/20/2018 (Teacher Summer Institute)
All Teachers, Counselors, Nurses, & Social Workers	9/1/2018
BASAS	9/1/18 - (All school days and add'l days mutually agreed upon)
Secretarial	9/1/2018
Paraprofessionals (incl. CFCs)	9/1/2018 (12 month) or 9/4/2018 (10 month)
Bus Monitors, Cluster Subs, and Per	See Operational leader for more information

Diem/Long-Term Subs	
Lunch Monitors,	9/6/2018
Managerial	7/1/2018 or determined by principal

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## Recruitment Cultivation and Diversity Programs (RCD) Team

### Staffing

#### Index:

- [Employee Background Checks](#)
- [Peoplesoft](#)
- [Compensation](#)
- [Leaves, Absences, and Substitutes](#)
- [Important Staffing Documents](#)
- [Probable Organization](#)
- [Licensure](#)
- [Hiring](#)

#### General Staffing Supports

##### Employee Background Checks

- [Superintendent's Circular - HS- PP9 - Criminal History Screening](#)

##### Annual Screening of Current Employees

- [Background Check Re-Certification Guide for Employees](#)
- [Background Check Re-Certification Guide for Managers and School Leaders](#)

##### Screening of New Employees

- [Fingerprinting instructions](#)

##### Volunteers

- [eCORI guide](#): CORIs can only be submitted via the eCORI Frevvo platform and identification must be verified and approved at the school sight. Results are shared via school specific templates, to gain access to your school's template. Contact your HC Manager.

##### Peoplesoft

- [PeopleSoft Link](#)
- [Secretary Handbook](#) - This includes information about:
  - [Changes to Reporting Time](#)

- [Navigation for BPS Timekeepers](#)
- [Reporting Absences](#)
- [Reporting Time for Substitute Teachers/Nurses](#)
- [Substitute Teacher Time Entry Summary Table](#)
- [Prior Period Absence Reporting](#)

### Logging into PeopleSoft

1. Go to [hub.boston.gov](http://hub.boston.gov) and login with your employee ID and passwords

**CITY of BOSTON LOG IN**

## LOG IN

USERNAME

PASSWORD

**LOGIN**

[Forgot your Password?](#)

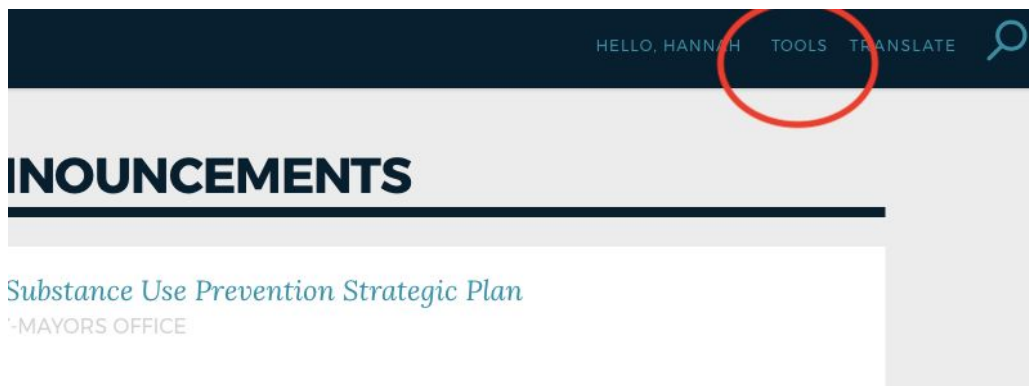
*Need help? Contact:*

**Boston Public School Employees**  
Office of Instructional & Information Technology's (OIIT) Helpdesk  
617-635-9200

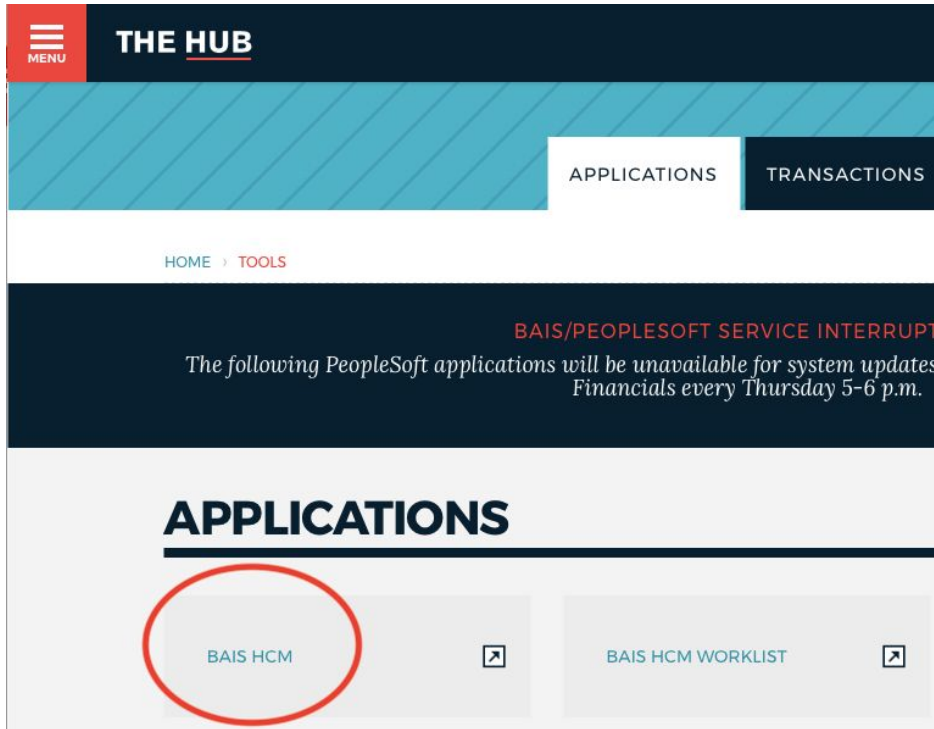
**All Other Employees**  
Employee Connect Center  
617-635-3221  
[employeeconnect@boston.gov](mailto:employeeconnect@boston.gov)

Note: If logging in from home, you will need to click “log in” again on the following page. The link is found at the top of the page.

2. Go to “Tools”

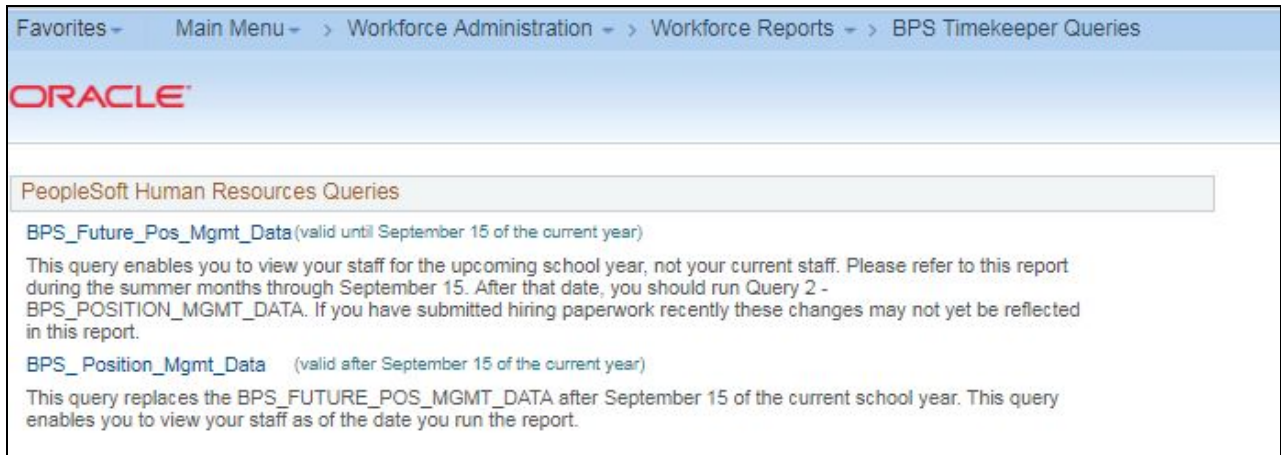


3. Go to “Applications” and select BAIS HCM for staffing information and BAIS Financials for budget information.



## Important PeopleSoft Queries

Screenshot:



- BPS\_Future\_Pos\_Mgmt\_Data (valid before September 15 of the current year)**

This query enables you to view your staff for the upcoming school year, not your current staff. Please refer to this report during the summer months through September 15. After that date, you should run Query 2 - BPS\_POSITION\_MGMT\_DATA. If you have submitted hiring paperwork recently these changes may not yet be reflected in this report.
- BPS\_Position\_Mgmt\_Data (valid after September 15 of the current year)**

This query replaces the BPS\_FUTURE\_POS\_MGMT\_DATA after September 15 of the current school year. This query enables you to view your staff as of the date you run the report.



- **BPS\_Address\_Tele**  
This query allows you to view the contact information for your staff. Until the new school year begins this information will be for last year's staff. When the effective start date of your new staff members occur, they will begin appearing on this report.
- **BPS\_Vacancies**  
This report will show you the vacancies that remain at your school for this upcoming school year. Please note that if you or a new employee has submitted hiring paperwork recently these changes may not yet be reflected in this report.
- **BPS\_License**  
This report will show you each employee in your department that has a current or inactive license issued by the MA Dept of Elementary and Secondary Education. This information is updated periodically, so please note the "Update Date" field for the latest date with these licenses were in the MDESE'S database.
- **BPS\_PPA**  
This report will return the primary (PPA) and any additional program areas (APA) for the employees in your department. A primary program area is assigned when a teacher receives his or her permanent status. Changes to the various PPA and APA must be submitted to OHR using the form found in the Superintendent Circular HRS-HS7.
- **BPS Time Reported**  
This query allows you to view the sum of all non-regular time reported by each employee in your department within a specific time period.
- **BPS Payroll Employee Review**  
This query has been created for you to review and confirm the positions and employees assigned to those positions for your department for the school year. The purpose of this query is to provide position and employee assignment, FTE, and Static Group ID for your review to ensure that all positions and employees are accurately assigned to the correct department for the school year. As soon as errors are identified, corrections for any discrepancies must be submitted to BPS Payroll before the payroll closes.
- **BPS Unapproved Absences**  
This query shows you all unapproved absences within a specified date range for a specified department
- **BPS Approved Absences**  
This query shows you all approved absences within a specified date range for a specified department.

### **Compensation**

- [Stipend memo](#): Superintendent Circular FIN-20 outlines the process and policies for stipends
- [Teacher salary scale](#)
- [Paraprofessional salary scale](#)
- [BASAS salary scale](#)
- [Managerial employee salary scale](#)

### **Leaves, Absences, and Substitutes**

## Leaves of Absence

**Contact:** Employee Services- Leave Management, [ohcleaves@bostonpublicschools.org](mailto:ohcleaves@bostonpublicschools.org)

- Short term leave: employee is absent for a period of 5 days or less
- Long term leave: employee is absent for a period of 6 or more days
  - For absences that are longer than 6 days in duration, the level of required medical documentation changes substantially.
  - Approval/denial for a long-term leave of absence is determined solely by the Office of Human Capital.
  - Any employee who is considering applying for a long-term leave absence must review the [HRS-PP13 Absence and Leave Policy](#) circular for information regarding the application process as well as understanding the policy conditions.

## Absence Reporting

**Contact:** Office of Labor Relations, [olr@bostonpublicschools.org](mailto:olr@bostonpublicschools.org) or [Payroll](#)

- Guidance on managing absences in PeopleSoft, including employee requests, found [here](#).
  - [Secretaries Guide for Reporting Absences](#)
- You can run reports on the attendance of all employees in your building through [Peoplesoft](#) by navigating to: **Main Menu →Workforce Administration→Workforce Reports→BPS Timekeeper Queries→BPS Time Reported**
- You are ultimately responsible for signing off on attendance/department time summaries. If a pattern of abuse is suspected and/or there are concerns regarding a particular employee's attendance, please consult with the Office of Labor Relations as early as possible
- Information regarding our attendance monitoring system can be found in [HRS-PP5](#).

## Sub Central:

**Contact:** Gwen Cleckley, Manager of Sub Central, 5-9380 or [gcleckley@bostonpublicschools.org](mailto:gcleckley@bostonpublicschools.org)

Short term sub requests:

- [Secretaries Guide for Reporting Time for Substitute Teachers/Nurses](#)
- [Sub Central Guide](#)- This includes instructions on how to use Sub Central to request a sub for a short-term teacher absence
- Long term sub requests:
  - If you have a candidate in mind, please complete the [Sub Request Form](#)
  - If you do not have a candidate to cover a long term leave, follow the steps below:
    1. Request that your Human Capital Manager post the confirmed, long term sub vacancy
    2. Recruit and select your candidate using the posting in TalentEd
    3. Submit your candidate for hire through TalentEd
    4. Complete the [Sub Request Form](#)

## Substitute Lunch Monitors:

**Contact:** Human Capital Coordinator

Each school has an individualized PC# for substitute lunch monitors tied directly to their sub. monitor budget line. We recommend you hire 1-2 substitutes per permanent Lunch Monitor prior to or early in the school year to ensure effective coverage.

- You can screen candidates from the applicant pool in TalentEd under the 'Substitute Lunch Monitor' post.
  - To recommend a candidate for hire please submit using the ***sub/perm lunch monitor*** workflow.

### **Important Staffing Documents**

[PS-03](#) - This document is required when making requests for the following:

- position changes,
- leaves of absence,
- termination/retirement,
- pay adjustments, or
- personal data changes

PS-08/09 - These requests are now done exclusively online

### **[Superintendent Staffing Circulars](#): Folder contains all OHC circulars**

- Managerial Conditions of Employment: Superintendent Circular HRS-HS-5
- Staffing, Reassignment, and Hiring of Teachers: Superintendent Circular HRS-HS-7
- Teacher Licensure and NCLB Requirements: Superintendent Circular HRS-L1
- Attendance Monitoring System: Superintendent Circular HRS-PP05
- Criminal History Screening: Superintendent Circular HRS-PP9
- Absence and Leave Policy: Superintendent Circular HRS-PP13
- Employee Resignation, Retirement, and Separations: Superintendent Circular HRS-PP17
- Performance-Related Dismissal Process for Teachers: Superintendent Circular HRS-PP19

### **Probable Organization**

**Contact:** Your Human Capital Manager. Please note that your Human Capital Managers will be in contact in December to provide more information about the Probable Org process.

- [Probable Organization Overview](#)- a brief overview of the Probable Org process
- [FY19 Budget & Probable Org. Guidance - Final \(12/7/17\)](#)- policies and guidelines from multiple central office departments essential to planning for next year. This will influence budget and staffing-related decisions made during Budget Collabs and Probable Org. **Please note that this is last year's guidance, and the guidance for the FY20 school year will be shared by December.**

### **Licensure:**

- Coming soon: Pathways information
- **NEW!** Check a DESE license [here](#) with the new public look-up tool
- Circulars:
  - [Superintendent Circular HRS-L1](#) - STATE LICENSURE AND FEDERAL NCLB HIGHLY QUALIFIED REQUIREMENTS FOR TEACHERS
  - [Superintendent Circular HRS-L2](#) - REQUIREMENTS FOR PARAPROFESSIONALS UNDER NCLB

- [Superintendent Circular HRS-L3](#) -LICENSURE REQUIREMENTS FOR PRINCIPALS/HEADMASTERS AND BASAS EMPLOYEES
- **FOR PRINCIPALS:** [Waiver Request Form](#)
- **FOR CANDIDATES:** [Candidate Waiver Acknowledgement Form](#)

**Hiring:**

**General Resources for All Employee Groups:**

- [TalentEd Admin Guide](#) - All vacant positions are posted on TalentEd. Please refer to this guide for more information regarding TalentEd.

**Hiring Process for Paraprofessionals:**

**Contact:** Human Capital Managers

These positions are subject to contractual, seniority-based bumping and assignment. Please reach out to your Human Capital Manager for more information about the hiring process for these positions.

- [Overview of Paraprofessional Transfer, Excess Pool, and Recall Process](#)

**Hiring Process for Teachers:**

**Contact:** Human Capital Managers

- [Hiring Menu of Supports & Resources](#) - Please see this tool for various supports for the hiring process, including preparing for the hiring season and conducting interviews.
- [Hiring Process Checklist](#)- This checklist provides links to folders with resources to support the following stages of the hiring process:
  - Preparing for Posting
  - Reviewing Applications
  - Conducting Interviews
    - [BPS Abridged Interview Question Bank](#)
    - [Office of Labor Relations Interview Guidance](#)
    - [Unlawful Interview Questions](#)
  - Submitting Hires
- [Hiring Approval Guidelines](#)- Follow these requirements to ensure your hire is approved
- [OLR Candidate Interview Guidance](#) - The Office of Labor Relations strongly suggests you follow this guidance when interviewing candidates.
- [Waiver Request Form](#)- Fill this out if you are recommending an educator for hire who does not hold appropriate licensure for the position.
  - [Waiver Request Guidelines](#) - this provides guidelines and examples of a strong waiver request

**Hiring Process for Managerial:**

**Contact:** Human Capital Managers

- [Compensation Review Form](#) - Fill this out if you are recommending someone for a managerial position
  - Managerial compensation tiers are shown [here](#)

- [Managerial Conditions of Employment](#) - please see information regarding managerial employees

**Hiring Process for Guild (Secretaries):**

**Contact:** Lauren McLean-Britt (or Human Capital Manager)

- [Administrative Guild Frequently Asked Questions \(FAQ\)](#) - This FAQ is meant to answer most common questions schools have about Guild positions.

**Hiring Process Employment Agreement Employees - EAEs (Formerly Independent Contractors)**

**Contact:** Your department or TLT's Staffing Coordinator

As of July 1, 2015 all School-Based Contracted Workers and Contracted Retiree's will be processed through the Office of Human Capital and approved by the City of Boston & Superintendent of Human Capital. They will be referred to as Employment Agreement Employees (EAE's) and will be hired into our PeopleSoft System.

For processing please view our [EAE Quick Guide](#)

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# Performance Management

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[Underperformer Resources:](#)

[Non-5 Step Resources:](#)

[Presentations](#)

## Key Resources at-a-glance

- [PMT Website](#)
  - [Interactive Rubric](#)
- [OHC PMT One-Pager](#) - Gives overview of important dates and deadlines. Ideal for printing and posting.
- [Evaluation Overview](#) - Gives a more comprehensive view of dates, deadlines and contractual obligations. Includes a month by month look at required and suggested performance management tasks.
- [Frequently Asked Questions](#)
  - [EDFS Caseload](#)
  - [Educators on Leaves of Absence](#)
  - [Evaluator Training](#)
  - [Altering Released Evaluations and the 5 Day “Editing Window”](#)
  - [Provisional Teachers - Dismissal and Permanency:](#)
  - What is the Suitable Professional Capacity program?

Contact: [eval@bostonpublicschools.org](mailto:eval@bostonpublicschools.org) for all evaluation related questions

## Evaluation Resources by Topic

### Contracts and Circulars:

Purpose	Description
<b><i>Bargaining Unit Contracts</i></b>	<ul style="list-style-type: none"> <li>● <a href="#">BTU</a>- 2010-2016 Teacher and Paraprofessional contract</li> <li>● <a href="#">Guild</a>- 2013-2016 Administrative Guild (school secretary) contract</li> <li>● <a href="#">BASAS</a>- 2013-2016 Boston Association of School Administrators contract</li> <li>● <a href="#">Lunch Monitors</a>- 2010-2016 Lunch Hours Monitor association contract</li> <li>● <a href="#">Custodial Staff</a>- 2010-2016 Painters and Allied Trades contract</li> </ul>
<b><i>BPS Evaluation Circulars</i></b>	<p><b>2017-18 Circulars: Found on the BPS Website <a href="#">here</a></b></p> <ul style="list-style-type: none"> <li>● Performance Evaluation of Teachers : <a href="#">HRS-PM1 (SY1718)</a></li> <li>● Performance Evaluation of Paraprofessionals: <a href="#">HRS-PM7 (SY1718)</a></li> <li>● Performance Evaluation of BASAS administrators: <a href="#">HRS-PM2 (SY1718)</a></li> <li>● Performance Evaluation of non-DESE -licensed BTU Specialists, BTU Central Office Administrators and other BTU Professionals: <a href="#">HRS-PM4 (SY17178)</a></li> <li>● Guild: <a href="#">HRS-PM3 (SY1718)</a></li> <li>● Lunch Monitors:<a href="#">HRS-PM5 (SY1718)</a></li> <li>● Custodial Staff: <a href="#">FMT-01(SY1516)</a></li> <li>● Managerial: <a href="#">HRS-PM6 (SY1718)</a></li> <li>● Substitutes: <a href="#">HRS-HS-6 (SY1718)</a></li> <li>● Cluster and Long Term Substitutes: <a href="#">HRS-PM9 (SY17178)</a></li> <li>● Bus and Cab Monitors: <a href="#">HRS-PM8 (SY1718)</a></li> </ul>

**Evaluator Training:**

<b>Purpose</b>	<b>Description</b>	<b>Resource</b>
<b><i>Initial Evaluator Training 101</i></b>	<p>All BPS employees may self-enroll in the 101 Evaluation Course on <a href="http://learn.mybps.org">learn.mybps.org</a>. They can sign on using their BPS ID and Password. Once they have completed the course and filled out the end of course survey, they will be assigned under the building Manager as an evaluator and are then assigned a caseload on EDFS.</p> <p>Teacher evaluators must meet the following requirements:</p> <ul style="list-style-type: none"> <li>● DESE licensed</li> <li>● Recommended by your principal/headmaster</li> <li>● Willing to serve as an evaluator</li> <li>● Rated Proficient or better</li> <li>● May not be the primary evaluator (may not write an evaluation) for an educator whose last rating was less than proficient, or, after collection of evidence, examination of that evidence suggests the educator may be rated less than proficient. In such cases, the Evaluator must relinquish that educator plan to a school-based administrator.</li> </ul> <p>Principals/Headmasters are then responsible for developing a system to check in and oversee their teacher evaluators.</p>	<p><a href="#">Online Evaluator Training Instructions</a></p>
<b><i>Evaluator Training Review</i></b>	<p>Evaluators who want to review any aspect of the training may access the Evaluator Training Review on <a href="http://learn.mybps.org">learn.mybps.org</a>, or you can check out the Module Powerpoints, linked to the right.</p>	<ul style="list-style-type: none"> <li>● <a href="#">Evaluator Training Review</a></li> <li>● <a href="#">Evaluator Training 101 Powerpoints</a></li> </ul>
<b><i>Ongoing Training</i></b>	<p>For already trained evaluators, there are several additional courses to support evaluator practice:</p> <ul style="list-style-type: none"> <li>● Observation and Feedback</li> <li>● Coaching and Support</li> </ul> <p>These courses can be found on My Learning Plan</p>	<ul style="list-style-type: none"> <li>● <a href="#">Coaching and Support Description</a></li> <li>● <a href="#">Observation and Feedback Website</a></li> </ul>
<b><i>FAQ answers</i></b>	<p>Please see the Frequently Asked Questions document for further information.</p>	<p><a href="#">FAQs</a></p>



## Evaluator Tools and Resources: Clarity - Support - Accountability

<b>Clarity</b>	<p><b><i>Aligning to District Initiatives</i></b></p> <ul style="list-style-type: none"><li>● <a href="#">Crosswalk: Teacher Rubric to Essentials for Instructional Equity</a></li><li>● <a href="#">TSI Rubric/Essentials Presentation 2017</a></li><li>● <a href="#">TSI Rubric/Essentials Presentation 2018</a></li><li>● <a href="#">Mendell example</a></li><li>● <a href="#">Office of Opportunity and Achievement Gaps Implementation Folder</a></li></ul> <p><b><i>Communicating Expectations</i></b></p> <ul style="list-style-type: none"><li>● <a href="#">Tynan Evaluation Letter</a></li><li>● <a href="#">Shaw Evaluation Letter</a></li><li>● <a href="#">Perkins Evaluation Letter</a></li><li>● <a href="#">Mendell Pre-Conference Agenda</a></li><li>● <a href="#">BGA Post-Conference Protocol</a></li><li>● <a href="#">Sample Evaluation Timeline for Underperformer</a></li><li>● <a href="#">Eval Orientation Presentation</a></li></ul> <p><b><i>Contractual Requirements:</i></b></p> <ul style="list-style-type: none"><li>● <a href="#">Evaluation Overview</a></li><li>● <a href="#">Rubrics</a> and <a href="#">Circulars</a></li><li>● <a href="#">Detailed checklist</a> for BTU</li><li>● <a href="#">Performance Management 1-pager</a> - key contractual requirements, deadlines, and terms</li></ul> <p><b><i>Organizational Structures:</i></b></p> <p>Keeping track of all the pieces of the evaluation process is essential to ensuring you are providing ongoing feedback and meeting your contractual obligations. Here are a few resources to help get you started:</p> <ul style="list-style-type: none"><li>● <a href="#">School Tracker 1 Instructions</a> - Create a Form to input observations that feeds into a spreadsheet that tracks contractual obligations and numbers of observations.</li><li>● <a href="#">School Tracker 2</a> - another option for tracking observations that uses one tab per teacher.</li><li>● <a href="#">Tynan Tracker example</a></li><li>● <a href="#">Edwards Tracker example</a></li><li>● <a href="#">Green Academy Tracker example</a></li><li>● <a href="#">Setting up Calendar Slot for observation debriefs</a></li><li>● <a href="#">Observation Spreadsheet</a> with automatic timestamping</li><li>● <a href="#">Sample: Observation and Feedback Plan</a></li><li>● <a href="#">Sample Schedule</a> with observation blocking</li><li>● <a href="#">Sample Observation Record - Anonymized</a></li></ul>
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	<ul style="list-style-type: none"> <li>● <a href="#">Sample Observation Record - Blank</a></li> </ul>
<b>Support</b>	<p><b>Coaching and Support:</b></p> <ul style="list-style-type: none"> <li>● <a href="#">BGA Post-Observation Protocol</a></li> <li>● <a href="#">Tynan Post-Observation Discussion Preparation</a></li> <li>● <a href="#">Mendell Pre-Conference Agenda</a></li> <li>● <a href="#">Edwards Coaching Document</a></li> <li>● <a href="#">Coaching Huddle</a></li> <li>● <a href="#">Content Coaching - Coaching and Support Class Materials</a></li> <li>● <a href="#">Peer observation</a></li> <li>● <a href="#">Observation and Feedback Course</a></li> <li>● <b>Difficult Conversations:</b> <ul style="list-style-type: none"> <li>○ <a href="#">Preparing for a Difficult Conversation</a></li> <li>○ <a href="#">Presentation on Difficult Conversations</a></li> <li>○ <a href="#">Presentation on Giving and Receiving Quality Feedback</a></li> <li>○ <a href="#">Difficult Conversations Protocol</a></li> </ul> </li> </ul> <p><b>Team Calibration:</b></p> <p>It is essential to ensure that your team is having frequent discussions about interpretation of practice so that teachers are receiving consistent and effective feedback. Here are some tools to support:</p> <ul style="list-style-type: none"> <li>● <a href="#">Suggested Agendas</a> - a list of monthly agendas for use with evaluator team to make sure everyone is on the same page.</li> <li>● <a href="#">Calibration Protocols</a> - a menu of protocols for facilitating discussion of observed practice against the DESE Teacher Rubric. <ul style="list-style-type: none"> <li>○ <a href="#">BPS District Calibration:</a></li> <li>○ <a href="#">DESE's Online Video Library and Calibration Tool</a></li> </ul> </li> <li>● <a href="#">Mendell Observation Tool</a></li> </ul> <p><b>Professional Development</b></p> <ul style="list-style-type: none"> <li>● <a href="#">O &amp; F</a></li> <li>● <a href="#">ASSET PD Catalogue</a></li> <li>● <a href="#">For Evaluators: Prescriptions/Next Steps Bank SY17-18 v.9</a></li> </ul> <p style="text-align: center;"><i><a href="#">Underperformer Support Resources</a></i></p>
<b>Accountability</b>	<ul style="list-style-type: none"> <li>● <a href="#">Evaluation Quality Review Tool</a></li> <li>● <a href="#">Criteria For Writing Strong Evaluations</a></li> <li>● <a href="#">Formative Assessment Components</a></li> <li>● <a href="#">For Evaluators: Prescriptions/Next Steps Bank SY17-18 v.9</a></li> <li>● <b>Sample Evaluations:</b></li> </ul>

	<ul style="list-style-type: none"> <li>○ <a href="#">Annotated Evaluation Exemplars</a></li> <li>○ <a href="#">Formative Assessment - Unsatisfactory</a></li> <li>○ <a href="#">Formative Assessment - Needs Improvement</a></li> <li>○ <a href="#">Formative Assessment using CSI</a></li> <li>● <a href="#">Presentation on Giving and Receiving Quality Feedback</a></li> <li>● <a href="#">Evaluation Evidence Review</a></li> </ul>
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**School Examples:**

	<p>Check out the <a href="#">Performance Management Resources</a> from the following schools:</p> <ul style="list-style-type: none"> <li>● Tynan</li> <li>● Boston Green Academy</li> <li>● Mendell</li> <li>● Edwards Middle School</li> <li>● Shaw</li> <li>● Perkins</li> <li>● Charlestown</li> <li>● Madison Park</li> <li>● Beginning of Year Presentations</li> </ul> <p>Do you have resources you have developed that you would like to share? Send them to <a href="mailto:eval@bostonpublicschools.org">eval@bostonpublicschools.org</a></p>
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**DESE 5-Step Resources:**

Purpose	Description
<b><i>Evaluation Orientation Presentation</i></b>	<p>Most union groups require a beginning of year evaluation orientations. DESE-Licensed Educators should be given an overview of the school’s evaluation expectations, a sample is provided below. The sign-in sheet and agenda from the presentation should be sent to OHC.</p> <ul style="list-style-type: none"> <li>● <a href="#">SAMPLE Beginning of Year Presentation for DESE-Licensed Educators</a></li> </ul>
<b><i>Caseload Support</i></b>	<ul style="list-style-type: none"> <li>● Review your <a href="#">Caseload Report</a> to see the evaluation status of your DESE-licensed staff</li> <li>● Identify your evaluators and distribution of caseload <ul style="list-style-type: none"> <li>○ <a href="#">Caseload Distribution - Who Can Evaluate Whom?</a></li> <li>○ <a href="#">Assign Evaluators</a> on EDFS</li> </ul> </li> <li>● Develop a Tracking System</li> </ul>
<b><i>Goals and Action Steps</i></b>	<ul style="list-style-type: none"> <li>● <b>Aligning Goals:</b> Supports for ensuring that goals are aligned with school-wide goals</li> </ul>

	<ul style="list-style-type: none"> <li>○ An example of how <a href="#">schoolwide focus areas can inform team goals</a></li> <li>○ A guide on how <a href="#">different types of assessments can be used in educator goals</a></li> <li>● <b>Writing Goals and Action Steps:</b> Supports for writing strong goals and action plans <ul style="list-style-type: none"> <li>○ This is a <a href="#">great resource</a> that will help educators write goals from the goal template.</li> <li>○ This guidance doc provides <a href="#">guiding questions for educators as they write their goals</a>.</li> <li>○ Here's a <a href="#">bank of goals</a> written by BPS educators.</li> <li>○ This worksheet helps educators <a href="#">plan out action steps</a>.</li> </ul> </li> </ul>
<b>Observations and Debrief</b>	<ul style="list-style-type: none"> <li>● <a href="#">Criteria for Effective Evidence and Feedback</a></li> <li>● <a href="#">Content - Strategy - Impact (CSI) Guidance</a></li> <li>● <a href="#">DESE Content Based Look-Fors</a></li> <li>● <a href="#">BGA Post-Observation Protocol</a></li> <li>● <a href="#">Tynan Post-Observation Discussion Preparation</a></li> <li>● <a href="#">Mendell Pre-Conference Agenda</a></li> <li>● <a href="#">Edwards Coaching Document</a></li> <li>● <a href="#">Coaching Huddle</a></li> <li>● <a href="#">Content Coaching - Coaching and Support Class Materials</a></li> <li>● <a href="#">Peer observation</a></li> <li>● <a href="#">Observation and Feedback Course</a></li> <li>● Difficult Conversations: <ul style="list-style-type: none"> <li>○ <a href="#">Preparing for a Difficult Conversation</a></li> <li>○ <a href="#">Presentation on Difficult Conversations</a></li> <li>○ <a href="#">Presentation on Giving and Receiving Quality Feedback</a></li> <li>○ <a href="#">Difficult Conversations Protocol</a></li> </ul> </li> <li>●</li> </ul>
<b>Artifacts</b>	<ul style="list-style-type: none"> <li>● <a href="#">Sample staff presentation on Artifacts</a></li> <li>● <a href="#">Artifact Guide</a></li> <li>● <a href="#">Suggested structure for writing a rationale</a></li> <li>● <a href="#">Artifact Stems - BGA Example</a></li> <li>● Using Google Drive for artifact collection: <ul style="list-style-type: none"> <li>○ <a href="#">Roosevelt Artifact Presentation</a></li> <li>○ <a href="#">Edwards Artifact Presentation</a></li> </ul> </li> </ul>
<b>Assessments and Evaluations</b>	<ul style="list-style-type: none"> <li>● <a href="#">Evaluation Quality Review Tool</a></li> <li>● <a href="#">Criteria For Writing Strong Evaluations</a></li> <li>● <a href="#">Formative Assessment Components</a></li> <li>● <b>NEW!</b> <a href="#">For Evaluators: Prescriptions/Next Steps Bank SY17-18 v.9</a></li> <li>● Sample Evaluations: <ul style="list-style-type: none"> <li>○ <b>NEW!</b> <a href="#">Annotated Evaluation Exemplars</a></li> </ul> </li> </ul>

	<ul style="list-style-type: none"> <li>○ <a href="#">Formative Assessment - Unsatisfactory</a></li> <li>○ <a href="#">Formative Assessment - Needs Improvement</a></li> <li>○ <a href="#">Formative Assessment using CSI</a></li> <li>● Hard Copy Evaluation Report Templates (in the event EDFS is unavailable) <ul style="list-style-type: none"> <li>○ <a href="#">Formative Assessment Report Template - Teacher/SISP (Blank)</a></li> <li>○ <a href="#">Formative Evaluation Report Template - Teacher/SISP (Blank)</a></li> <li>○ <a href="#">Summative Evaluation Report Template - Teacher/SISP (Blank)</a></li> </ul> </li> <li>● <a href="#">Presentation on Giving and Receiving Quality Feedback</a></li> </ul> <p style="text-align: center;"><i>See also <a href="#">Underperformer Resources</a></i></p>
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**Rubrics:**

Purpose	Description	Resource
<b><i>DESE Rubrics</i></b>	BPS follows The Department of Elementary and Secondary Education’s Massachusetts Model System for Educator Evaluation Rubrics.	<ul style="list-style-type: none"> <li>● <a href="#">DESE Teacher Rubric</a></li> <li>● <a href="#">DESE School Level Administrator Rubric</a></li> <li>● <a href="#">DESE Superintendent Rubric</a></li> </ul>
<b><i>DESE Rubric - Specialized Instructional Support Personnel Rubric (SISP)</i></b>	<p>Guidance and School Adjustment Counselors, School Nurses, School Psychologists, Speech/Language Pathologists, Occupational and Physical Therapists, and CoSESS are on SISP rubric.</p> <p>The SISP Rubric describes practice that is common across educators in professional support roles such as school counselors, school psychologists, school nurses, and others defined in the recognition clause of the appropriate collective bargaining agreement. It is intended to be used throughout the 5-step evaluation cycle for educators who provide direct services such as education, therapy, counseling, assessment, and diagnosis to a caseload of students, as well as educators who may provide indirect support to students through consultation to and collaboration with teachers, administrators, and other colleagues.</p>	<ul style="list-style-type: none"> <li>● <a href="#">DESE Specialized Instructional Support Personnel Rubric</a></li> <li>● <a href="#">OT/PT Indicators</a></li> <li>● <a href="#">School Nurse Indicators</a></li> <li>● <a href="#">School Counselor Indicators</a></li> </ul>

<b>DESE Rubric Proficiency</b>	A resource developed by the PAR program that gives overall proficiency language for each element and provides a few look-fors for each.	<ul style="list-style-type: none"> <li>● <a href="#">DESE Proficiency Rubric</a></li> </ul>
<b>BPS Look-Fors</b>	<ul style="list-style-type: none"> <li>● <a href="#">Teacher Rubric with BPS Look-Fors</a> including new connections to the Essentials.</li> <li>● <a href="#">Early Childhood BPS Rubric Look-Fors</a></li> <li>● Librarian Look-Fors- coming soon!</li> </ul>	
<b>Interactive Rubric</b>		<ul style="list-style-type: none"> <li>● <a href="#">Interactive Rubric</a></li> </ul>
<b>Element Pyramid</b>		<ul style="list-style-type: none"> <li>● <a href="#">Element Pyramid for teachers</a></li> <li>● <a href="#">Element Pyramid for SISP</a></li> </ul>

**Notifications/Directives:**

<b>Purpose</b>	<b>Description</b>	<b>Resource</b>
<b>Plan Acknowledgement</b>		<ul style="list-style-type: none"> <li>● <a href="#">Educator Plan Acknowledgement Form</a></li> </ul>
<b>Plan Notification</b>	If you are changing the date of the evaluation release, you must notify the educator in writing.	<ul style="list-style-type: none"> <li>● <a href="#">Evaluation Delivery Notification Letter</a></li> </ul>
<b>Deadline Extension Notification</b>	Plans are typically paused when an educator goes on leave. For educators on less than proficient plans, the length of the plan will be extended by the number of days they have been out on approved leave. This letter should be sent to verify the new plan end date. For less than proficient plans, the Timelines should also be updated accordingly. See the Underperformer Section for additional resources.	<ul style="list-style-type: none"> <li>● <a href="#">Extension of Evaluation Due to LOA</a></li> </ul>
<b>Artifact Notification</b>	Educators must be informed in writing of deadline for artifact submission before Formatives and Summatives.	<ul style="list-style-type: none"> <li>● <a href="#">Artifact Notification</a></li> </ul>

<b>Change in Record Notification</b>	If you need to make any changes to an educator’s plan, they should be notified in writing.	<ul style="list-style-type: none"> <li>• <a href="#">Notice of Administrative Change to Record</a></li> </ul>
<b>Directives</b>	If an educator fails to meet a deadline or respond to a request, you can send a directive to require them to comply or face disciplinary consequences.	<ul style="list-style-type: none"> <li>• <a href="#">Self-Assessment/Goals Directive</a></li> <li>• <a href="#">Formative Meeting Directive</a></li> </ul>

**Underperformer Resources:**

Purpose	Description	Resource
<b>Deciding on Plan Length</b>	<ul style="list-style-type: none"> <li>• Evaluators may use their discretion when deciding the length of Directed Growth or Improvement Plans, but should carefully consider how to best balance urgency for students with fairness for adults.</li> </ul>	<a href="#">Plan Duration/Change of Plan/Contract Guidance</a>
<b>Setting Clear Expectations</b>	<ul style="list-style-type: none"> <li>• All educators on Directed Growth and Improvement Plans should be presented with a timeline that outlines the plan expectations.</li> <li>• A signed copy of the timeline should be uploaded as an artifact to the plan.</li> <li>• <b>Reminder:</b> <ul style="list-style-type: none"> <li>○ Directed Growth - Goals are co-created by educator and evaluator</li> <li>○ Improvement - Goals are created by the evaluator</li> </ul> </li> </ul>	Timelines <ul style="list-style-type: none"> <li>• <a href="#">Directed Growth Timeline Template</a></li> <li>• <a href="#">Improvement Plan Timeline Template</a></li> <li>• <a href="#">Improvement Plan Cycle</a></li> <li>• <a href="#">Directed Growth Plan Cycle</a></li> </ul>
<b>BTU Assistance Programs</b>	These are two BTU programs designed to offer support to underperforming teachers. <ul style="list-style-type: none"> <li>• See <a href="#">here</a> for a comparison of the two programs.</li> <li>• Educators request Peer Assistance via <a href="#">MyLearningPlan</a>; direct inquiries for PAR to <a href="mailto:par@bostonpublicschools.org">par@bostonpublicschools.org</a></li> </ul>	<a href="#">Peer Assistance</a> and <a href="#">PAR Process</a>
<b>Co-Observers</b>	Content Specialist are available to conduct a co-observation or advise on an educator’s performance.	Contact <a href="mailto:eval@mybps.org">eval@mybps.org</a> to make a request
<b>Documentation</b>	It is important to ensure you are following the proper steps to document and inform educators at all stages in the evaluation process. If an educator fails to comply with contractual obligations, including meeting job expectations, please reference the Office of Labor Relations resources and Directives templates for further guidance.	<ul style="list-style-type: none"> <li>• <a href="#">Educator Plan Acknowledgement Form</a></li> <li>• <a href="#">Notifications / Directives</a></li> <li>• <a href="#">OLR Supervisor Resources (Labor</a></li> </ul>

		<ul style="list-style-type: none"> <li><a href="#">Relations)</a></li> <li><a href="#">Contractual requirements</a> (page 2)</li> </ul>
<b>Feedback and Next Steps</b>	Providing clear feedback aligned with actionable next steps is essential for helping teachers improve. This bank provides sentence frames and links to effective resources to support feedback.	<ul style="list-style-type: none"> <li><a href="#">For Evaluators: Prescriptions/Next Steps Bank SY16-17 v.9</a></li> <li><a href="#">Presentation on Giving and Receiving Quality Feedback</a></li> <li><a href="#">Preparing for a Difficult Conversation</a></li> <li><a href="#">Presentation on Difficult Conversations</a></li> <li><a href="#">Difficult Conversations Protocol</a></li> </ul>
<b>Termination</b>	Contains a sample agenda for the summative/intent to dismiss meeting for teachers, a step-by-step guide to initiate the dismissal process, and other resources	<ul style="list-style-type: none"> <li><a href="#">90 Day Provisional Probationary Dismissal Memo</a></li> <li><a href="#">Guidance Docs on the Termination Process for School Leaders</a></li> </ul>
<b>Labor Relations</b>	The Office of Labor Relations provides guidance on disciplinary issues, responses to grievances, and recommendations for dismissal.	<ul style="list-style-type: none"> <li><a href="#">OLR Supervisor Resources (Labor Relations)</a></li> <li><a href="#">AWOL</a></li> </ul>

**Non-5 Step Resources:**

Purpose	Description	Resource
<b>Non-5 Step Evaluation Overview</b>	<p>Gives an overview of the BPS evaluation process for the following employee types:</p> <ul style="list-style-type: none"> <li>○ Paraprofessionals</li> <li>○ BASAS</li> <li>○ Guild</li> <li>○ Lunch Monitors</li> <li>○ Custodial</li> <li>○ Managerial</li> <li>○ Substitute Teachers</li> </ul>	<ul style="list-style-type: none"> <li><a href="#">Non-5 Step Overview</a></li> <li><a href="#">Paraprofessional Orientation Presentation EXAMPLE</a></li> </ul>



<b>Dates and Deadlines</b>	Different union groups have specific deadlines for completing the required steps outlined in the contracts and circulars, all of which are captured in the resource to the right. Please see the individual contracts and circulars for complete guidance.	<ul style="list-style-type: none"> <li>• <a href="#">Non-5 Step Overview</a></li> <li>• <a href="#">Non-5 Step Dates and Deadlines</a></li> <li>• See relevant <a href="#">contracts and circulars</a></li> </ul>
<b>Entering into EDFS</b>	While most 5-Step employee groups require employees receive a paper copy, the final ratings should be entered into EDFS.	<a href="#">Entering Ratings into EDFS for Non-5 Step employees</a>
<b>Submitting paper evaluations</b>	Signed paper evaluations must be submitted to <b>OHC</b> by the date indicated in the circular Details <a href="#">here</a>	<ul style="list-style-type: none"> <li>• <a href="#">Non-5 Step Dates and Deadlines</a></li> <li>• See relevant <a href="#">contracts and circulars</a></li> </ul>
<b>Social Workers</b>	<ul style="list-style-type: none"> <li>• <a href="#">Social Workers- non-DESE licensed = BT3 rubric, paper eval HRS-HM PM4</a></li> <li>• Social Workers- DESE licensed = use SISP rubric, EDFS</li> </ul>	

**Presentations**

<b>Purpose</b>	<b>Description</b>	<b>Resource</b>
<b>August Leadership Institute</b>	Outlines the Performance Management expectations and supports for School Leaders.	<a href="#">ALI-OHC 2018</a> <a href="#">ALI- OHC 2017</a>
<b>New Principal Institute</b>		<a href="#">NPI- 2018</a>
<b>Teacher Summer Institute</b>		<ul style="list-style-type: none"> <li>• <a href="#">TSI Rubric/Essentials Presentation 2017</a></li> <li>• <a href="#">TSI Rubric/Essentials Presentation 2018</a></li> </ul>
<b>Coherence Building</b>	Provides seven moves leaders should consider for establishing healthy performance management cultures.	<a href="#">Using Eval to Build Instructional Coherence</a>

<p><b><i>Beginning of Year Eval Orientation</i></b></p>	<p>Most union groups require a beginning of year evaluation orientations. DESE-Licensed Educators should be given an overview of the school’s evaluation expectations, a sample is provided to the right. The sign-in sheet and agenda from the presentation should be sent to OHC.</p>	<p><a href="#">SAMPLE Beginning of Year Presentation for DESE-Licensed Educators</a></p> <p><a href="#">Paraprofessional Orientation Presentation EXAMPLE</a></p>
<p><b><i>Evaluator Training Review</i></b></p>	<p>Please see the <a href="#">Evaluator Training</a> section for complete information. All Evaluators need to trained via the online modules on learn.mybps.org. Evaluators who want to review any aspect of the training may access the Evaluator Training Review on learn.mybps.org, or you can check out the Module Powerpoints, linked to the right.</p>	<p><a href="#">Evaluator Training Review</a></p> <p><a href="#">Evaluator Training 101 Powerpoints</a></p>