



General Guidelines Unaffiliated Performance Framework and Evaluation 2019-2020

The *Unaffiliated Performance Framework* provides a new opportunity and tool supervisors will use to consistently engage with employees around their performance. While being evaluated will be a new experience for many employees, supervisors should emphasize that the evaluation process generates an opportunity for all staff to identify ways they can more effectively contribute to our mission. If this process surfaces confusion or misconceptions about an employee's responsibilities please use this opportunity to review and update employee job descriptions.

All unaffiliated employees should have a signed "Mid-Year Review" (Mid-Year) by **December 30, 2018** and a signed "End of the Year Evaluation" (Annual) by **June 30, 2019**. Supervisors should submit all evaluations online and complete all post-observation conferences by these dates.

Completing the Evaluation

- I. The Mid-Year is formative and designed to help the employee understand how he or she may be rated during the formal Annual Evaluation. As such, it provides an opportunity for the supervisor and employee to identify areas and ways in which the employee may improve his or her performance before the Annual.
- II. Evaluations will be completed on an online portal. Supervisors will be provided with a link for accessing evaluations, and will enter employees' IDs to complete the evaluation.
 - *Best practice:* Use Google Chrome to complete the evaluation.
- III. The evaluation prompts supervisors to enter a start and end date for the evaluation period. The evaluation period for the Mid-Year Review began on July 1, 2019, and ends on the date on which the evaluation is completed. The Annual is cumulative and covers from July 1, 2019, through the date on which the evaluation is completed.
- IV. Supervisors must provide comments to support ratings. Comments should include low-inference data (reference specific aspects of the employee's work or behavior) and refer back to the framework. *Supervisors must provide comments when giving a Partially Effective or Ineffective rating on an indicator.* Comments that reinforce for the employee what he or she is doing well are also helpful.



- *Best practice:* Copy all of your comments into a word document before submitting the evaluation.
- V. *Number of absences:* Only sick days taken since July 1st, 2019, should be counted. Other kinds of absences, and sick days taken before this date, should not be counted.
- VI. Upon completion of an evaluation, supervisors must download the evaluation before exiting out of the online portal.
- VII. After downloading the evaluation, supervisors must email it to the employee and set up the post-evaluation conference. Employees will not automatically receive a copy of the Mid-Year or Annual.
- VIII. To change a Mid-Year or Annual:
- *Before an evaluation is submitted:* Supervisors who start but do not have time to complete an evaluation have one week to return to the evaluation before it is deleted. To save work completed so far (without submitting it), click the red arrow to reach the next screen in the evaluation then exit out of the program. To return to the evaluation, click on the evaluation link shared and enter the employee ID.
 - *After evaluation is submitted:* After an evaluation is submitted, Supervisors will receive an email with a link which may be used to revise the evaluation. Supervisors only need to make the desired changes and resubmit the evaluation. To submit the revised evaluation, click through the entire evaluation until there are no red arrows. This new submission will replace the original review or evaluation submitted. When revising an evaluation after the evaluation conference, download and print the corrected evaluation, sign it and have the Employee sign it.

The Mid-Year Review or Annual Evaluation Conference

- IX. The conference should occur within 10 work days of the submission. The evaluation/review will prompt supervisors to schedule this conference with the employee and generate an email to the employee with the date and time selected on the evaluation for the post-evaluation conference.
- X. A copy of the evaluation must be provided to the employee at least 24 hours before the conference.
- XI. The Supervisor who writes the evaluation must conduct the evaluation conference. Unless agreed to by the Employee, no other staff members should be present during the conference.



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- XII. During the post-evaluation conference, provide the employee with the opportunity to write comments on the printed evaluation form, using the “Employee’s Final Comments” section at the end of the evaluation.
- XIII. Any action/outcome that occurs during the conference with the employee must be documented on the hardcopy.
- XIV. The printed evaluation should be signed by the employee and supervisor at the conference. If the employee is unwilling to sign the evaluation, remind the employee that a signature only confirms that the meeting occurred; it does not constitute agreement with the statements/ratings. If the employee still refuses to sign, document on the printed form that the employee is unwilling to sign and have a witness sign in the witness section of the document certifying that the meeting took place. The witness must be another supervisor. Before signing the evaluation, the witness must confirm that the meeting was held and that the employee refused to sign.
- XV. During the Annual conference:
- *For Employees rated Effective or Highly Effective:* During the Annual Evaluation conference, the Employee and Supervisor should work together to complete the [Goal Setting Worksheet](#), setting goals for the coming year. Goals should refer directly to the framework and identify ways to improve performance.
 - *For Employees rated Partially Effective or Ineffective:* The Supervisor and Employee must collaboratively create a [Corrective Action Plan \(CAP\)](#) during the evaluation conference. The CAP should identify specific action steps the Employee will take to improve performance in order to become Effective or Highly Effective in a recommended two to three targeted, high-leverage, areas. The CAP must include how the Supervisor will support the Employee to improve performance, as well as a timeline for providing regular, consistent feedback on the Employee’s progress.
- XVI. At the end of the conference, Employees should confirm the conference was held by taking conference confirmation survey. The link will be provided when the review or evaluation period opens. Evaluations will not be considered complete unless this survey is taken.

Record Management

- XVII. The signed original evaluation must be maintained in the individual’s personnel file and a signed copy should be provided to the employee. If the supervisor does not maintain the employee’s personnel file, he or she should keep a copy of the evaluation in his or her office, in order to refer to it as necessary.



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Rebuttals

XVIII. Employees who disagree with the final rating on their Annual Evaluation should submit a rebuttal in writing within 10 days of their evaluation conference to unafevals@nps.k12.nj.us, cc'ing the Supervisor and the manager of the Supervisor. Rebuttals should include the original evaluation, reference specific indicators and provide evidence to support the desired change in rating. The manager of the Supervisor, or his or her designee, will review all rebuttals and make a final determination, or opt to take no further action.

If you have any questions about this process, please email unafevals@nps.k12.nj.us.