

Dear :

Attached/Enclosed are the materials you requested regarding educator evaluation. You will find a set of materials with thoughts and guidelines to consider as you implement the evaluation process as well as sample documents collected from various congregations and institutions. Please note that The ARJE makes no implied or expressed endorsement of any one of these instruments and /or processes. They are provided here as a response to requests made by congregations and institutions for samples from which to work.

What The ARJE does recommend, however, is that both institution and educator engage in a regular process of self-reflection and review, and that the process emphasize a spirit of collaboration and partnership regarding mutually agreed-upon goals and expectations.

We know that a process of evaluation is a challenging but meaningful enterprise that can result in significant improvement that will be of benefit to everyone connected with the congregation and/or institution.

We hope you find these materials helpful.

L'shalom,

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Executive Director

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Force

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Evaluating Educational Leadership For Institutions and Educators

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INTRODUCTION

We read in the Torah, in *Parashat Kedoshim*, “*Btzedek tishpot amitecha*, judge your colleague fairly” (Leviticus 19:15). The evaluation of educational leadership is a significant and challenging endeavor. It is important for educators to engage in a process of self-reflection and evaluation of their own performance and skills on an ongoing basis. It is equally as important that those who are charged with evaluating the educator be thoroughly conversant regarding the purpose and the expectations of the evaluation. **Indeed, the most successful frameworks for evaluation occur when goals and expectations are mutually agreed-upon in advance, as a formal part of the process. Ideally, there is a sense of partnership and collaboration regarding both the objectives of the institution’s education program, and the evaluation process and the expectations it sets out regarding educational leadership (both professional and lay).**

The purpose of evaluation is to improve performance. It is a tool for stimulating and fostering reflection and dialogue between the partners who are involved in the evaluation process. The evaluation process should not be viewed as a tool to formalize a previously-made decision regarding contract status. Program evaluation, while clearly important, should not be confused or combined with the educator evaluation process. The two processes should be carried out separately from one another.

An evaluation of curriculum and program should occur as its own ongoing process through which decisions regarding program are made. These decisions involve determinations of, among other things, program value, models, impact, goals, consequences, cost-effectiveness, and participant options and possible improvements. This type of ongoing evaluation, conducted on a formal and informal basis, helps to keep programs fresh and of high quality

Educator evaluation can provide guidance regarding both professional competencies and personal behaviors that impact on completion of responsibilities, professional skills and proficiencies, and professional conduct. The aims are to set priorities for future time allocation, personal development, and the improvement of performance. The best approaches and strategies are those that identify both strengths and areas for improvement; the process then is crafted to lead to mutually agreed-upon goal-setting and action-planning for an upcoming time period. The process should **not** serve as a rating scale that is summative in nature.

As much as we recognize the abilities of educators, we also recognize that each person comes to his/her job with varied skills and talents. Some have strengths in organization and administration, while others excel in curriculum development and programming. Some possess content strengths in Judaica and Hebrew while others stand out in informal programming and family education. Some educators have very

formal work styles, while others are much less so. It is during the initial search and interview process that the congregation should determine if the educator has a skill set that matches its expectations. Of course, **it is critically important that the congregation communicate its goals and expectations to the candidates both during and after the hiring process.** It is at this time that support systems and a mutually-agreed upon evaluation plan should be established in order to build on strengths and to identify areas in which growth might be needed.

While the “perfect person” does not exist, a mutually agreed-upon evaluation process that emphasizes collaboration and partnership can provide guidance, support and growth opportunities for both lay and professional leadership that will be of benefit to all parties.

GOALS OF THE EVALUATION

The aim of the evaluation process is to foster the improvement of the educator’s performance by establishing performance objectives for a period of time. Sometimes the goal is to improve dialogue in a variety of areas, encouraging conversations that might not take place within the normal daily routine of conducting school business. An overall goal might be to create a personal development plan for the educator. **Goals, objectives and expectations will surely differ from one institution to another, and perhaps even from year to year. A “one size fits all” evaluation strategy, therefore, is NOT recommended.** Indeed, it may be prudent to describe one or two areas upon which to focus in a given year. It is critical to utilize the evaluation process to **enhance and further** mutually agreed-upon goals and expectations of both the educator and the institution.

The evaluation process frequently (though not always) involves the establishment of specific improvement goals for the educator that are aimed at improving performance. Goals should have attributes which make them meaningful and

realistic, and they should be mutually agreed-upon at the beginning of the process. The goals may go beyond basic work responsibilities. They may lean toward improvement of specific skills and may aim toward the development of a program for the school.

For example, one year the primary focus of an evaluation may be based on previous goal-setting which emphasizes the use of communication devices and technology when communicating with teachers and parents. In another year, the goal may be to evaluate the educator's role in guiding and implementing a curriculum plan throughout the school year. And another year may focus on follow-up and methods of handling parent concerns.

What follows are some selected examples of performance goals. This is not a comprehensive or exhaustive list, and both institutions and educators will develop their own mutually agreed-upon objectives in a spirit of collaboration and partnership and commitment towards mutual growth and development.

- ◆ In order to improve parent communication, the educator will complete four newsletters per year and create a system for monitoring calls to parents.
- ◆ By the end of the year, the educator will develop a system of teacher evaluation and present the model to the Education Committee.
- ◆ In order to increase his/her basic knowledge, the educator will select two areas of Judaic interest and develop a personal growth plan to include reading, coursework, and study.
- ◆ The educator will assess the needs of the teachers for staff development in-service programming and plan two teacher in-service days during the year.

SOME GUIDING PRINCIPLES

- It is healthy and beneficial for institutions to engage in regular reflection and ongoing processes of evaluation for **all** employees, not only the educator.
- Evaluation of all professional staff members should take place within the context of the institution and its goals.
- The evaluation schedule and process should be the same for all professional staff. A different process should be established for all support staff.
- The goals and objectives of the evaluation process should be mutually agreed-upon in a spirit of partnership and collaboration.
- The evaluation process should be a reflective and ongoing one, and should **NOT** be implemented in response to a crisis or salary negotiation.
- This process can be successful only if the inherent value of ongoing evaluation becomes a cultural norm that is “bought into” by professionals and lay leadership alike.
- Contract negotiations should not occur at the same time as the evaluation process.

CAUTIONS

- Cautions regarding the evaluation process can guard participants against abuses and negative interactions that result from unhealthy systems.
- Limit the number of participants involved in evaluating the educator. Facing a room full of lay leaders or staff is anxiety-producing and not productive.

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- Do not create an evaluation process for one professional if none is in place for other staff members. This type of single evaluation creates a feeling of persecution rather than supportive positive interaction.

- If a decision has already been made not to offer a contract for further employment, do not go through a lengthy discussion under the guise of evaluation to improve performance. This makes the delivery of a simple message lengthy and painful.

- The evaluation system should match the parameters established within the educator's contract.

TIMING

Educator evaluation is not as simple as having a spring evaluation conference, handing over the summative report and moving on. For evaluation to result in improvement of skills or performance, it is an **ongoing** process. While there is no one perfect time-line, a reasonable one might be:

- Spring meeting and process to identify areas of strength and areas deserving of attention.

- Summer work for the educator to develop an action plan

- Fall meeting to discuss the plan, provide support and set the plan in motion.

- Midwinter check to see how progress is moving.

- Spring meeting to discuss the outcomes and begin the process again.

PARTICIPANTS IN THE EVALUATION PROCESS

In the private sector, it is often felt that a person should be responsible to one supervisor and thus not be faced with conflicting feedback or directions.

Unfortunately, within the synagogue setting, reporting to a single supervisor is not always practical or a part of the culture of the organization. Further, it is difficult for the educator to be successful without positive interaction with the Rabbi, other staff members, and the lay leadership. Participants in the evaluation process may include the Education Committee chair, congregational officers or a personnel committee. Since lay leadership changes frequently, we recommend that continuity be maintained by insuring that at least some leaders who participate in the process remain involved for a few years. In a setting where the educator is only responsible to one person for the formal evaluation, a system of collecting input from others may be appropriate. While collecting information from teachers may be useful, extreme care must be taken so that the educator-teacher relationship is not compromised. Participants in the evaluation process may be outlined in the bylaws of the congregation.

Each institution should establish one person to be responsible for educator evaluation. Examples exist of this being a Rabbi, a lay leader, or another staff person. The lay leader may be a vice-president responsible for staff or a chair of the Education Committee. The person in charge of the evaluation may be responsible for sharing the process and results of the educator evaluation with a personnel committee, the Education Committee and / or the institution's board of directors.

It is not the goal of the educator to win a “popularity contest.” Parents and / or children formally evaluating the educator is discouraged. The input from a minority group of parents can be given undo importance. This is not to say that feedback from students, parents, and teachers may not be considered as a part of the process, but in such cases the system of collecting the information must be handled with great caution and impartiality. The ARJE is opposed to the use of congregational surveys in the process of evaluation process, as they are frequently counter-productive.

ADDITIONAL SUGGESTED RESOURCES

Evaluating School Leadership: A Handbook on Searching, Interviewing, and Evaluating School Heads and Committees, by Chervin, Aft, Richman, and Margolis, published by the BJE of Greater Boston 2002, Telephone: 617-965-7350, Email: Postmaster@BJE.org.

Brit Kodesh Sacred Partnership: Readings and Exercises for Self-Study on the Relationship between the Professional and Volunteer Leadership in Reform Congregations, Union for Reform Judaism Department of Synagogue Management, Telephone: 212-650-4040, E-mail: synagoguemgmt@urj.org.

The Role of Temple Boards in Congregational Education: A Discussion Guide by Keren Alpert, UAHC, 2001, Telephone: 212-650-4040

Temple Employee Performance Review

Employee _____

Position _____

Completed by _____

Additional comments may be made and attached on separate sheets, if noted and initialed by employee in appropriate sections.

		Exceeds Expectations	Satisfactory	Needs Improvement	<p>Summary – Overall Performances</p> <p>() Exceeds Expectations () Meets Expectations () Below Expectations</p> <hr/> <p>Supervisor’s Signature</p> <p>_____</p> <p>Date: _____</p> <p><small>Employee: I certify that this report has been discussed with me. I understand my signature does not necessarily indicate agreement. Comments: (attach separate sheet if necessary)</small></p>
1.	Quantity of work: Volume of work regularly produced. Speed and consistency of output.				
2.	Quality of work: Work meets quality requirements of accuracy, thoroughness and effectiveness.				
3.	Judgment: Extent to which decisions and actions are based on sound reasoning and weighing of outcomes.				
4.	Initiative: Extent to which employee is a “self-starter” in attaining objectives of the job.				
5.	Organizing ability: Planning and performing work to meet requirement and schedules.				
6.	Adaptability: Able to perform variety of assignment within scope of job and learn new tasks.				
7.	Job knowledge: Expert of job mastery and understanding of duties.				
8.	Dependability: Follow instructions, reliable, fulfills responsibilities.				
9.	Job attitude: Amount of interest and enthusiasm shown.				
10.	Peer relations: Extent to which employee maintains effective working relationship with others.				
11.	Attendance: Employee’s record of tardiness and absence.				
12.	Professional demeanor: Personal grooming, neatness and appropriate dress.				<hr/> <p>Employee Signature</p> <p>Date _____</p>

Congregation Koufax
Employee Self-Evaluation: Introduction

1. Describe the nature of the work you do (feel free to attach a copy of your job description).
2. What are your strengths / assets ?
3. Please describe areas in which you would like to improve.
4. Please comment on the following (rate them from 1 to 5, with 5 being the highest).
 - Follow-through
 - People-skills
 - Creativity
 - Initiative
 - Communication
 - i. Written
 - ii. Verbal
 - Attention to Detail
 - Judgment
5. Were you able to meet the goals of your last review (see following pages) ?
6. What additional resources and support (if any) would help you carry our your job ?
7. What additional topics or areas would you like to address or have considered during this review ?

**Congregation Koufax Director of Religious Education
Self-Evaluation**

Areas of Responsibility	Accomplishments	Goals
Plan, implement, supervise, evaluate, and revise Religious and Hebrew School curriculum.		
Secure appropriate curricular materials.		
Implement and supervise system to assess student performance.		
Implement/supervise <i>B'nai Mitzvah</i> program, including tutorials.		

Areas of Responsibility	Accomplishments	Goals
Organize/supervise family education program.		
Provide supervision, guidance, and support to faculty.		
Maintain regular communication with parents.		
Organize/lead (with input and support of clergy) children/family workshop programs: <i>t'filot</i> , family shabbaton, retreats, holidays		
Teach classes as appropriate.		

Areas of Responsibility	Accomplishments	Goals
Recruit, hire, train, and (as appropriate) dismiss faculty.		
Conduct regular faculty meetings and faculty performance reviews.		
Prepare annual school calendar, schedule classes, assign space, order books and supplies.		
Prepare annual budget for submission to Schools Committee; monitor income and expenditures.		
Oversee school safety policies and conditions.		

Areas of Responsibility	Accomplishments	Goals
Participate in regular meetings with senior staff.		
Integrate students and families into larger congregational community.		
Project the school and its image in the local and citywide lay and Jewish communities.		
Maintain affiliation with national and local professional organizations and keep current on development in the field of Jewish education.		

B'NAI BIGTHAN EDUCATION DIRECTOR EVALUATION

Please help me evaluate my own performance by completing this questionnaire and returning it to me. I appreciate our honesty. You may sign it if you so desire but you are one of a select group of teachers who I am asking to evaluate me and therefore I really need our response by Wednesday, May 13th.

Circle your ranking: 1 is low - 4 is high

2. Sensitivity to teachers, children, and parents. This item should evaluate if I am understanding of others. Whether I listen to concerns and show a general concern for others. This item looks at how we resolve conflicts.

1 2 3 4 NA

3. Organizational skills. This item looks at my bulletins scheduling, meetings. It looks at whether I get the appropriate materials for children in a timely manner and communicate to teachers about their desires for resources.

1 2 3 4 NA

3. Concern for the school. This item is one which looks at the way I view my mission. Do I convey my desire to have a quality, serious school? Do I convey this philosophy to children and parents? Do I really care about our school?

1 2 3 4 NA

4. Encouragement of professional growth. This item covers encouragement for CFJE, BJE, Melton, and other professional growth opportunities. This item includes advertising and payment for these opportunities.

1 2 3 4 NA

5. Teacher evaluation and feedback. This item includes lesson plan feedback and observation feedback.

1 2 3 4 NA

Please use the back to make comments and suggest any goals that I should set for myself.

Thank you.

Educator Evaluation

This process is used for all senior staff at the Temple B'nai Bartholomew. It is done with a staff supervisor and a lay person. In the case of the educator, the process involves the senior rabbi and the Vice-President for Education.

1. What went well and why ?
2. What did not go well and why not ?

What needs to change in order for things to go well ?

What help do you need in order for you to work well ?

3. What are your goals for the coming year ?

**TEMPLE
1992 PERFORMANCE EVALUATION
PROFESSIONAL STAFF**

NAME	POSITION	EMPLOYMENT DATE	
1. PROFESSIONAL GOALS AND ASPIRATIONS: How well were they defined, to what extent have they been reached.			
		EXPECTATION	
SELF		SELF	EVAL
		Above	
EVALUATOR'S COMMENTS		At	
		Below	
2. SKILLS AND KNOWLEDGE OF POSITION: Keeps current on recent issues and thinking in the field. Devotes time to self-development and intellectual pursuits in an effort to expand impact of service. Participates in activities to promote Judaism.			
SELF		SELF	EVAL
		Above	
EVALUATOR'S COMMENTS		At	
		Below	
3. RELATIONSHIP WITH THE CONGREGATION: Relates to the membership and is responsive to their needs; represents Temple in a positive, professional manner. Makes an impact on the Temple's ability to reach out to its members.			
SELF		SELF	EVAL
		Above	
EVALUATOR'S COMMENTS		At	
		Below	

4. RELATIONSHIP WITH THE COMMUNITY: Participates in community events; actively promotes the Temple within the Jewish community.

SELF		SELF	EVAL
	Above		
EVALUATOR'S COMMENTS	At		
	Below		

5. ADMINISTRATIVE, ORGANIZATIONAL AND PLANNING: Plans, organizes and follows projects through to completion; assumes responsibility and takes initiative; sustains productive work, meets reasonable time estimates and effectively controls and completes assignments. Has disciplined approach. Makes effective use of resources.

SELF		SELF	EVAL
	Above		
EVALUATOR'S COMMENTS	At		
	Below		

6. COMMUNICATION SKILLS: Evaluate the effectiveness of letters, memoranda, and other forms of written communication. In conversation, are intentions communicated effectively? Are instructions understood the first time? Does the individual sell ideas, obtain acceptance and action?

SELF		SELF	EVAL
	Above		
EVALUATOR'S COMMENTS	At		
	Below		

7. INTERPERSONAL RELATIONS AND TEAMWORK: How well do you interact with other staff members? How well do you accept criticism, or handle uncomfortable situations?

SELF		SELF	EVAL
	Above		
EVALUATOR'S COMMENTS	At		
	Below		

8. RELATIONSHIP WITH THE BOARD: Keeps Board informed of activities; is receptive to Board members' ideas and suggestions; makes sound recommendations for Board action; facilitates decision-making process for the Board.

SELF		SELF	EVAL
	Above		
EVALUATOR'S COMMENTS	At		
	Below		

9. EFFECTIVE LEADERSHIP: Hires competent staff members; encourages staff development; deals with staff honestly and fairly; supervises effectively. How well do you recognize problems, and are able to develop relevant facts, formulate alternative solutions, and effectively act on them?

SELF		SELF	EVAL
	Above		
EVALUATOR'S COMMENTS	At		
	Below		

10. FISCAL MANAGEMENT: Does your budget reflect philosophic goals while giving attention to fiscal responsibility? How well do you promote your budget? How successful are you in keeping within your budget?

SELF		SELF	EVAL
	Above		
EVALUATOR'S COMMENTS	At		
	Below		

11. List specific performance achievements during the past year.

SELF

EVALUATOR'S COMMENTS

12. List items of less than expected performance during the past year.

SELF

EVALUATOR'S COMMENTS

13. Briefly list specific work objectives and assignments for the coming year.

SELF

EVALUATOR'S COMMENTS

**TEMPLE
PERFORMANCE EVALUATION - PROFESSIONAL STAFF**

- 13a. Please review the attached "**Job Description**", commenting upon any specific responsibilities that you feel warrant attention at this time. In doing so, consider those responsibilities which you feel you have fulfilled in an outstanding manner, those you may not have fulfilled in accordance with your own expectations, those which received little or no attention (please indicate why), those which you feel should be "changed".

SELF

EVALUATOR'S COMMENTS

14. Individual's comments:			
OVERALL EVALUATION: (to be completed by evaluator) Consider ratings assigned in the above area; however, the overall evaluation is not necessarily an average of them. In contract year, include recommendation for continued employment or dismissal.	Overall Self-Evaluation		
	Above	At	Below
Individual's Signature	Overall Evaluation		
	Above	At	Below
	Date	Evaluator's Signature (interview held)	Date

INSTRUCTIONS FOR COMPLETING THE PERFORMANCE EVALUATION

This Performance Evaluation is to serve as a record of performance and accomplishments during the past 12 months and as a catalyst for determining the following year's direction. Its purpose is to summarize the information necessary to report the individual's current performance and to assist in effectively developing a joint vision of the future.

A self-evaluation is completed by rating performance and entering narrative comments in each of the items. At the beginning of each section are criteria to be considered in establishing ratings. Ratings and comments should be kept as objective as possible. Please note that "At Expectation" describes satisfactory performance. The evaluator will record ratings and comments for these same items in conjunction with the self-evaluation..

After both the individual being evaluated and the evaluator have completed the form, the performance evaluation interview is held. The individual then signs the form and may add any comments he or she believes appropriate in item 18. The evaluator also signs the form. This evaluation form will be the basis for the meeting of the staff member with the Professional Staff Development Committee.

The following descriptions will help you in using the evaluation scale.

RATINGS

Note: The basis for performance ratings must be indicated in the comments section.

Above Expectation	Indicates exceptional performance that consistently exceeds the requirements of the position. Very little, if any supervision or guidance is required in daily work.
At Expectation	Indicates performance that consistently meets the requirements of the position. Works very well with a minimum of supervision. This is the evaluation that is normally used to describe performance which meets the high quality standards of the Firm.
Below Expectation	Indicates performance that requires improvement. If this category is used, there must be specific comments regarding how performance is to be improved.
No Basis	Write "no basis" in the section if the evaluator is unable to appraise the performance of the individual due to the nature of the individual's assignment.

OTHER COMMENTS BY EVALUATOR

Additional comments or observations not previously made with respect to the rating, either exceptional performance or recommendations for improvement, may be made in the space provided. Recommendations for improvement should be directed to specific areas in which the staff member should improve performance.

TEMPLE
PROFESSIONAL STAFF DEVELOPMENT COMMITTEE

ACTION PLAN FOR FISCAL YEAR _____ - _____

Staff Member _____ Date Prepared _____

Developing a Plan:

In this section the staff member and the Rabbi should prepare jointly an action plan for professional and personal development for the following year. This action plan should build on the individual's strengths as recognized throughout the evaluation form, and should assist in the improvement of the areas discussed during the evaluation process. This action plan should also take into consideration the overall responsibilities of the Temple staff, the needs of the Congregation, the expectations of the Community, and our obligation to support Judaism and Jewish causes.

Area for Development - Goals	Action Plans
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TEMPLE TEGLACH PERFORMANCE ASSESSMENT FORM

Performance Period: From _____ To _____

Name _____

Position _____

PERFORMANCE GOALS AND RESULTS

List 4-6 performance goals that reflect key job responsibilities and special projects. Goals should be specific, measurable, agreed upon, realistic, and time-bound. If necessary, goals can be revised during the year based on the agreement of the reviewer and the reviewee.

GOAL (INCLUDE MEASURES)	DUE DATE	WEIGHT (%)	RESULTS	RATING*

Signature _____

100%

ADDITIONAL ACCOMPLISHMENTS

TEMPLE TEGLACH CORE ATTRIBUTES

PROFESSIONALISM	LEADERSHIP	PERSONAL INTERACTIONS	FLEXIBILITY

*Rating Exceeds Expectations – Performance consistently meets and frequently exceeds job requirements
Successful – Performance fully meets job requirements
Needs improvement – Performance meets some, but not all job requirements

Overall Rating _____

KEY STRENGTHS (List up to 3 of this employee's top strengths)

- 1)
- 2)
- 3)

AREAS FOR DEVELOPMENT (List up to 3 areas where this employee could improve and develop performance)

- 1)
- 2)
- 3)

PERSONAL DEVELOPMENT PLAN (Identify action plans to address the areas for personal and professional growth which include specific recommendations and time frames.)

Reviewer Signature _____ **Date Prepared** _____

Employee Signature* _____ **Date Discussed with Employee** _____

*Signature represents receipt and understanding, but does not necessarily represent agreement.

Employee Comments

DIRECTIONS FOR COMPLETING THE TEMPLE Teglach PERFORMANCE ASSESSMENT FORM—REVIEWEES

GOAL SETTING MEETINGS – JUNE

- After the Temple Teglach goals have been set, begin thinking about what you would like to accomplish to help the congregation meet its goals. You should consider the conversation you had during your year-end performance discussion and include developmental goals that you discussed.
- Put together a draft of your goals. Remember to make them SMART (Specific, Measurable, Agreed Upon, Realistic, and Time Bound)
- Discuss your goals with your reviewer(s). Make any adjustments/changes based on your meeting.
- Write your goals on the Performance Assessment form, sign it, and have your reviewer(s) sign it. Both of your signatures show that you have agreed upon your goals.

INFORMAL FEEDBACK DISCUSSIONS – MONTHLY OR WHEN NEEDED/WANTED

- Throughout the year, give updates on your progress toward your goals.
- Ask for feedback on your performance especially after key accomplishments.
- Make any adjustments to your goals during these discussions.

MID-YEAR PERFORMANCE DISCUSSION – OCTOBER / NOVEMBER

- Write up the status of the results to date of your goals.
- Meet with your reviewer(s) for feedback on your goals and your core attributes.
- Make any adjustments to your goals at this time.

INFORMAL FEEDBACK DISCUSSIONS – MONTHLY OR WHEN NEEDED/WANTED

- Throughout the year, give updates on your progress toward your goals.
- Ask for feedback on your performance especially after key accomplishments.
- Make any adjustments to your goals during these discussions.

YEAR-END PERFORMANCE DISCUSSION – MAY

- Complete the “**PERFORMANCE GOALS AND RESULTS**”, “**ADDITIONAL ACCOMPLISHMENTS**” and “**CORE ATTRIBUTES**” sections on page 1 of your Performance Assessment form. *(Be prepared to discuss specific examples that illustrate your accomplishments and behaviors).*
- Complete the “**KEY STRENGTHS**”, “**AREAS FOR DEVELOPMENT**” and “**PERSONAL DEVELOPMENT PLAN**” on page 2 of our Performance Assessment form.
- Give the complete Performance Assessment form to your reviewer(s) and schedule a time to meet with your reviewer(s).
- Meet with your reviewer(s) to discuss your accomplishments for the year and begin talking about your plans for the following year.
- After your discussion, sign your Performance Assessment Form. Keep a copy for yourself and the original goes in your personnel file.

DIRECTIONS FOR COMPLETING THE TEMPLE TEGLACH PERFORMANCE ASSESSMENT FORM—REVIEWERS

GOAL SETTING MEETINGS—JUNE

- After the Temple Teglach goals have been set, begin thinking about what you would like your staff person to accomplish to help the congregation meet its goals. You should consider the direction you would like to take as well as the conversation you had during your year-end performance discussion and include developmental goals that you discussed.
- Set up a meeting to discuss your thoughts about possible goals and to see what your staff person has in mind.
- Have your staff person write his/her goals on the Performance Assessment Form.
- Discuss the goals. Ask questions to clarify the issues. Make any adjustments/changes.
- After you agree on the goals, you should both sign the document. Both of your signatures show that you have agreed upon your goals.

INFORMAL FEEDBACK DISCUSSIONS—MONTHLY OR WHEN NEEDED/WANTED

- At regular intervals throughout the year, have meetings to get updates on your staff person's progress toward his/her goals.
- This is especially important to do after key accomplishments have been attained.
- Make any adjustments to the goals during these discussions.

MID-YEAR PERFORMANCE DISCUSSION—OCTOBER / NOVEMBER

- Complete the Performance Assessment Form based on information and progress toward goals at this time.
- Meet with your staff person to give feedback on his/her goals and his/her core attributes.
- Make any adjustments to the goals at this time.

INFORMAL FEEDBACK DISCUSSIONS—MONTHLY OR WHEN NEEDED/WANTED

- At regular intervals throughout the year, give updates on your staff person's progress toward his/her goals.
- This is especially important to do after key accomplishments have been attained.
- Make any adjustments to the goals during these discussions.

YEAR-END PERFORMANCE DISCUSSION—MAY

- Gather feedback from others and complete pages 1 and 2 of the Performance Assessment Form. *(Be prepared to discuss specific examples that illustrate accomplishments and behaviors.)*
- Schedule a time to meet with your staff person.
- Meet with your staff person to discuss his/her accomplishments for the year and begin talking about plans for the following year
- After your discussion, you and your staff person should sign the Performance Assessment Form. The staff person gets a copy and the original goes in his/her personnel file.

TEMPLE TEGLACH SUGGESTED BEHAVIORS FOR CORE ATTRIBUTES

PROFESSIONALISM

- Integrity
- Accountability
 - Ability to admit when you're wrong
 - Follows through on projects
- Organization skills
- Subject matter knowledge / expertise
- Willingness to learn / self-development

LEADERSHIP

- Vision
 - Support the Temple Teglach vision
 - Articulate
 - Establish for own functioning
- Initiator
- Commitment
- Mentors / develops people
- Role model

PERSONAL INTERACTIONS

- Teamwork
- Respect
 - For others
 - For other people's time
- Communications
 - Written and oral
 - Good listener
 - Clearly and articulately presents ideas
- Patience
- Compassion
- "*Menschlichkeit*"

FLEXIBILITY

- Embraces change
- Leads change
- Anticipates change and responds accordingly
- Open-minded / receptive to new ideas / approaches
- Improves existing processes
- Objective

CONGREGATION OUR LADY OF A THOUSAND MITZVAHS

EVALUATION INSTRUMENT

EDUCATION DIRECTOR

PERFORMANCE DIMENSIONS OF _____

Position _____ Date _____

Reviewed by _____ Self Evaluator _____

This section should be completed separately by both the staff member and supervisor/evaluator, and then discussed by them to review their responses.

Rating Scale: EE = Exceeds Expectations
 ME = Meets Expectations
 NI = Needs Improvement

Note: A comment is optional for EE and ME but is required whenever NI (Needs Improvement) is given as the rating.

TASKS:	EE	ME	NI
1. Develop and implements the philosophy of Reform Jewish education in the school	—	—	—
2. Develop and evaluates curriculum	—	—	—
3. Plans, with proper notice and oversight, open houses and parent / teacher conferences	—	—	—
4. Supervises the ordering of necessary materials and supplies for the school	—	—	—
5. Prepares an annual budget of anticipated expenses in consultation with school committee	—	—	—
6. Submits regular columns for the temple newsletter	—	—	—
7. Develops evaluation tools, report cards, and notices to keep parents informed of their children's progress	—	—	—
8. Develops a code of conduct for proper discipline and maintains it	—	—	—
9. Supervises the school by being present during school hours	—	—	—
10. Coordinates school programs, activities, and administration needs with main office	—	—	—
11. Develop post-B'nai Mitzvah programs	—	—	—
12. Act in an advisory capacity to school committee and Board of Directors	—	—	—

Comments: _____

FACULTY:	EE	ME	NI
1. Directs and inspires the teaching staff by being aware of and disseminating new ideas and trends in Jewish education	—	—	—
2. Recruits and employs talented and knowledgeable staff and faculty for the professional operation of the school program	—	—	—
3. Coordinates in-service and out-service programs for staff development	—	—	—
4. Calls and directs regular faculty meetings	—	—	—
5. Observes and evaluates staff and makes appropriate recommendations to the staff and school committee	—	—	—

Comments: _____

ADDITIONAL JEWISH EXPERIENCES:	EE	ME	NI
1. Provides opportunities for faculty, students, and families to come together for enhanced Jewish experiences such as teaching teams, assemblies, field trips, and family services	—	—	—
2. Arrange enrichment (non-classroom) activities	—	—	—
3. Develop Family Programming	—	—	—

Comments: _____

PERSONAL QUALITIES

ACTION: Action is initiating a task, plan, or project and then following through to its completion.

- | | EE | ME | NI |
|---|-----------|-----------|-----------|
| 1. Takes the initiative | — | — | — |
| 2. Seeks and identifies opportunities, the acts to capitalize on them | — | — | — |
| 3. Anticipates changes that need to be made | — | — | — |
| 4. Generates solutions, and actively participates in their implementation | — | — | — |

Comments: _____

TEAMWORK: Teamwork is a cooperative effort to achieve a common goal.

- | | EE | ME | NI |
|--|-----------|-----------|-----------|
| 1. Helps other team members to achieve common goal | — | — | — |
| 2. Participates in developing team goals | — | — | — |
| 3. Puts good of group over self | — | — | — |
| 4. Shares responsibility, recognition, and ownership of team goals and results | — | — | — |

Comments: _____

CREATIVITY: Creativity is employing originality, imagination, and inventiveness to generate new ideas, alternatives and solutions.

- | | EE | ME | NI |
|--|-----------|-----------|-----------|
| 1. Develops new or improved methods, products, and services | — | — | — |
| 2. Combines elements of existing methods and practices with new techniques | — | — | — |
| 3. Is willing to experiment and take appropriate risks to achieve innovative solutions | — | — | — |

Comments: _____

COMMUNICATIONS: Communication is effectively expressing and receiving ideas, thoughts, and information.

EE ME NI

- | | | | |
|--|---|---|---|
| 1. Listens and observes attentively, allowing an exchange of information | — | — | — |
| 2. Speaks and writes clearly and concisely, with an appropriate awareness of intended audience | — | — | — |
| 3. Disseminates information appropriately | — | — | — |
| 4. Is candid and honest in expressing thoughts and ideas, while remaining sensitive to others | — | — | — |

Comments: _____

DECISION-MAKING: Decision-making is using sound, logical judgment to choose an appropriate course of action.

EE ME NI

- | | | | |
|--|---|---|---|
| 1. Gathers, analyzes and acts upon relevant information | — | — | — |
| 2. Prioritizes decisions based upon temple goals and strategies | — | — | — |
| 3. Seeks assistance and encourages participation of others in decision-making as appropriate | — | — | — |

Comments: _____

LEADERSHIP: Leadership is guiding, directing, motivating, and influencing others.

EE ME NI

- | | | | |
|--|---|---|---|
| 1. Serves as a credible role mode, displaying and instilling a positive attitude | — | — | — |
| 2. Builds a strong sense of teamwork, purpose, and group identity | — | — | — |
| 3. Understands and is sensitive to the needs of others | — | — | — |

Comments: _____

PROFICIENCY: Proficiency is using a combination of knowledge, skill, experience, and perseverance that results in a high level of achievement or accomplishment.

- | | EE | ME | NI |
|---|-----------|-----------|-----------|
| 1. Applies a broad variety of skills and knowledge in order to perform the job well | — | — | — |
| 2. Organizes and plans work activities so as to reduce waste, delay, and redundancy | — | — | — |
| 3. Strives for excellence | — | — | — |

Comments: _____

ACCOUNTABILITY: Accountability is accepting responsibility for one's own actions and those of the team; it is pride in one's performance, and a sense of ownership of individual and team outcomes

- | | EE | ME | NI |
|---|-----------|-----------|-----------|
| 1. Accepts personal responsibility for one's obligation and commitments to others | — | — | — |
| 2. Is answerable for the quality and timeliness of work results, measured against pre-established goals | — | — | — |
| 3. Offers help as appropriate to accomplish tasks or objectives outside one's area of responsibility | — | — | — |

Comments: _____

ADAPTABILITY: Adaptability is working effectively under changing conditions.

- | | EE | ME | NI |
|--|-----------|-----------|-----------|
| 1. Anticipates and prepares for change | — | — | — |
| 2. Seeks to understand differing positions or opposing viewpoints | — | — | — |
| 3. Effectively handles the requirements of multiple or competing tasks | — | — | — |

Comments: _____

DEVELOPMENT: Development is the fostering of an environment that maximizes the value of human resources.

EE ME NI

- | | | | |
|--|---|---|---|
| 1. Encourages people to realize their potential | — | — | — |
| 2. Develops training plans with employees, and provides training and tools for improvement | — | — | — |
| 3. Develops and implements plans for self-improvement | — | — | — |

Comments: _____

The Milton Berle Day School

2003 Headmaster Evaluation

This form should be completed by both the Headmaster and (Members of) the Personnel Committee

Rating (Place check in box with appropriate number)

Name of Person Completing This Form _____ Date _____

		1 Disagree completely	2 Disagree somewhat	3 Neither agree nor disagree	4 Agree somewhat	5 Agree completely
1.	The Head enjoys open, cordial, and professional relationships with the Board.	1	2	3	4	5
2.	The Head selects capable administrators, delegates well to them, and makes use of them as a team.	1	2	3	4	5
3.	The Head hires, supervises, and develops faculty and enjoys good relationships with them.	1	2	3	4	5
4.	The Head relates well with the student body and provides leadership to them.	1	2	3	4	5
5.	The Head relates well with alumni and represents the school well with that constituency.	1	2	3	4	5
6.	The Head enjoys good relationships with the parents of current student and provides the proper image of the school.	1	2	3	4	5
7.	The Head represents the school well in the community and amongst other preparatory schools.	1	2	3	4	5
8.	The Head is an excellent public speaker.	1	2	3	4	5
9.	The Head mingles well with all constituencies and handles one-on-one meetings well.	1	2	3	4	5

Comments:

		1 Disagree completely	2 Disagree somewhat	3 Neither agree nor disagree	4 Agree somewhat	5 Agree completely
10.	The Head identifies and addresses key issues	1	2	3	4	5
11.	The Head brings the school positive recognition	1	2	3	4	5
12.	The Head makes good decisions	1	2	3	4	5
13.	The Head displays sensitivity to people	1	2	3	4	5
14.	The Head has poise and appropriate appearance	1	2	3	4	5
15.	The Head approaches problems creatively	1	2	3	4	5
16.	The Head inspires	1	2	3	4	5

Comments:

Open-ended Questions

1. Please indicate the Head's most significant strengths and most significant areas for improvement:

2. Please list what goals the Head should have for the next year:

3. What additional resources would be of help to the Head during the coming year ?
