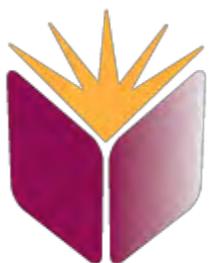


MONTANA EDUCATOR PERFORMANCE APPRAISAL SYSTEM (MONTANA-EPAS)

**A State Model for
Principal Evaluation**

June 2013



opi.mt.gov

**Montana
Office of Public Instruction
Denise Juneau, State Superintendent**

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Montana Educator Performance Appraisal System (Montana-EPAS)

A State Model for Evaluation

High-quality, high-performing teachers and school leaders are critical to ensure student learning. An evaluation system based in professional growth for all educators will help to foster learning environments that meet the needs of all students. (Evaluation Systems Work Group, May 7, 2013)

Introduction

The Montana Educator Performance Appraisal System (Montana-EPAS) is the state model for the evaluation of teachers and school leaders. This standards-based evaluation system is designed to encourage professional learning through a continuum of career development. The Montana-EPAS provides useable tools for school districts to pilot the state model or use a common framework to begin aligning local systems of evaluation to the state standards. Improving professional practice of educators will help to assure student success.

The Montana-EPAS was developed by a subgroup, Evaluation Systems Work Group, formed to meet the requirements of the Board of Public Education (BPE). Below is the BPE standard relating to evaluation

ARM [10.55.701](#) Board of Trustees ...

(4)(a) The evaluation system used by a school district for licensed staff shall, at a minimum:
(i) be conducted on at least an annual basis with regard to nontenure staff and according to a regular schedule adopted by the district for all tenure staff; (ii) be aligned with applicable district goals, standards of the Board of Public Education, and the district's mentorship and induction program required under ARM 10.55.701(5)(b); (iii) identify what skill sets are to be evaluated; (iv) include both formative and summative elements; and (v) include an assessment of the educator's effectiveness in supporting every student in meeting rigorous learning goals through the performance of the educator's duties.

(4)(b) ... the Superintendent of Public Instruction shall develop and publish model evaluation instruments that comply with this rule in collaboration with the MEA-MFT, Montana Rural Education Association, Montana School Boards Association, School Administrators of Montana, and Montana Small School Alliance.

The Montana-EPAS is founded on research-based evaluation processes. Research-based evaluation processes: include formative and summative measures that lead to continuous improvement; are aligned to state standards that reflect excellence; foster a culture of professional growth, which informs practice and promotes learning; and are based on multiple, balanced measures that are fair and ethical. Districts are encouraged to establish mutual core values that will serve as the foundation of their local evaluation system. Based on research and core foundational values of evaluation, the primary purpose of the Montana-EPAS is to promote growth in effective instructional practice that will enable success for all students.

Montana-EPAS Implementation

Districts may pilot the Montana-EPAS by adopting, adapting, and modifying the new state model, or begin to align their local evaluation system to state standards. Both implementation options fulfill BPE requirements.



Purpose

Montana Educator Performance Appraisal System (Montana-EPAS) Principal Evaluation

The primary purpose of the model Montana system for evaluation of teachers and principals is to foster continuous professional growth, enabling success for all students. The model state evaluation system is based on three core concepts: professional growth, continuous improvement and quality assurance.

Professional growth focuses on enhancing the skills and knowledge of educators through:

- Self-assessment and goal-setting;
- Working with colleagues;
- Taking courses;
- Attending workshops;
- Designing new programs;
- Accessing the district mentoring and induction programs
- Piloting new programs or approaches;
- Developing proficiency in test data analysis; and
- Other learning opportunities.

Continuous improvement focuses on the teacher's commitment to continuously improving practice so that student performance is continuously enhanced.

Quality assurance focuses on the collection of credible evidence about educator performance. Evaluators use the evidence to make important decisions about:

- Recognizing effective practice;
- Recommending a support plan; and
- Recommending continued employment.

Interstate School Leaders Licensure Consortium (ISLLC) Standards

Principal evaluation is grounded in research and an understanding of leader performance in high-achieving schools. Principal evaluation provides a strong focus on teaching and learning. The data and evidence collected as part of the process reflect the ongoing work of the principal.

Foundation of Educational Leadership

The ISLLC standards exemplify the key content knowledge, skills and dispositions necessary for the development of effective principals. A continuum of professional growth throughout a principal's career recognizes that one gains skill and expertise overtime. Individual school principals often focus time and energy on certain standards and performances that directly relate to their current administrative role.



The Six ISLLC Standards

ISLLC Standard One: Shared Vision

An education leader promotes the success of every student by facilitating the development, articulation, implementation, and stewardship of a vision of learning that is shared and supported by all stakeholders.

Functions

- Collaboratively develop and implement a shared vision and mission
- Collect and use data to identify goals, assess organizational effectiveness, and promote organizational learning.
- Create and implement plans to achieve goals.
- Promote continuous and sustainable improvement, including mentorship and induction programs.
- Monitor and evaluate progress and revise plans.

ISLLC Standard Two: School Culture

An education leader promotes the success of every student by advocating, nurturing, and sustaining a school culture and instructional program conducive to student learning and staff professional growth.

Functions

- Nurture and sustain a culture of collaboration, trust, learning, and high expectations.
- Create a comprehensive, rigorous, and coherent curricular program.
- Create a personalized and motivating learning environment for students.
- Supervise instruction.
- Develop assessment and accountability systems to monitor student progress.
- Develop the instructional and leadership capacity of staff.
- Maximize time spent on quality instruction.
- Promote the use of the most effective and appropriate technologies to support teaching and learning.
- Monitor and evaluate the impact of the instructional program.



ISLLC Standard Three: Management of Learning

An education leader promotes the success of every student by ensuring management of the organization, operation, and resources for a safe, efficient, and effective learning environment.

Functions

- Monitor and evaluate the management and operational systems.
- Obtain, allocate, align, and efficiently utilize human, fiscal, and technological resources.
- Promote and protect the welfare and safety of students and staff.
- Develop the capacity for distributed leadership.
- Ensure teacher and organizational time is focused to support quality instruction and student learning.

ISLLC Standard Four: Family and Community

An education leader promotes the success of every student by collaborating with faculty and community members, responding to diverse community interests and needs, and mobilizing community resources.

Functions

- Collect and analyze data and information pertinent to the educational environment.
- Promote understanding, appreciation, and use of the community's diverse cultural, social, and intellectual resources.
- Build and sustain positive relationships with families and caregivers.
- Build and sustain productive relationships with community partners.

ISLLC Standard Five: Ethics

An education leader promotes the success of every student by acting with integrity, fairness, and in an ethical manner.

Functions

- Ensure a system of accountability for every student's academic and social success.
- Model principles of self-awareness, reflective practice, transparency, and ethical behavior.
- Safeguard the values of democracy, equity, and diversity.
- Consider and evaluate the potential moral and legal consequences of decision-making.
- Promote social justice and ensure that individual student needs inform all aspects of schooling.



ISLLC Standard Six: Societal Context

An education leader promotes the success of every student by understanding, responding to, and influencing the political, social, economic, legal, and cultural context.

Functions

- Advocate for children, families, and caregivers.
- Act to influence local, district, state, and national decisions affecting student learning.
- Assess, analyze, and anticipate emerging trends and initiatives in order to adapt leadership strategies.

Framework for Principal Evaluation

The model Montana system for the evaluation of principals is founded on ISLLAC Standards (2008). The four framework components are listed below.

1. Vision and Goals
2. Culture of Learning
3. Management
4. Professional Responsibilities

NOTE

The following pages explain the evaluation standards and their connection with the ISLLC Standards. Each component is described, and a plan to bring all the components into a coherent, manageable system is provided. Interlinking the four components is both intentional and necessary.



Component One: Vision and Goals

ISLLC Standard One: Shared Vision

Overview

Component One: *Vision and Goals*, of principal evaluation is directly linked to ISLLC Standard One: *Shared Vision*. Component One focuses on the principal's role and involvement in establishing, implementing, promoting, and communicating the vision and goals of the school and/or district. Component One aligns with the school and/or district strategic plan and goals. The goals and strategies contained within the district and/or school strategic plan also align to a principal's individual goals. School and/or district strategic plans are to outline the strategies, timelines, and assessment standards. Principal initiatives are clearly aligned to the school and/or district strategic plan, and are part of his or her work for the year. Working with an existing document that is reviewed and revised annually facilitates the focus of the evaluation process on continuous improvement.

Criteria: The following criteria are used to evaluate the performance of the principal.

1. Vision and Goals

a. Assessing Data

Principal, in collaboration with others, such as the school or district improvement team or board, uses multiple sources of information and assists in analyzing data to establish rigorous and concrete school and/or district improvement goals in the context of student achievement and instructional programs.

b. Implementing Vision and Goals

Principal provides leadership for major initiatives and change efforts relative to the school and/or district improvement goals. Principal is committed to doing the work required for continuous school and district improvement.

c. Promoting Vision and Goals

Principal promotes high expectations for teaching and learning. Principal is committed to ensuring that all students have the knowledge and skills necessary to become successful in future educational activities.

d. Communicating the Vision and Goals

Principal communicates effectively to appropriate stakeholders about progress toward meeting the school and district improvement plan goals. Principal participates in a process to regularly monitor, evaluate and revise school and district improvement goals.

Assessment

Component One is assessed through

- A review of the evidence provided by the principal.
- Conferences between the evaluator and the principal.

Possible Sources of Evidence

- Emails and memos to staff
- Parent newsletters
- Meeting agendas
- Descriptions of procedures and processes



Component Two: Culture of Learning

ISLLC Standard Two: School Culture

Overview

Component Two: *Culture of Learning*, aligns directly with ISLLC Standard Two: *School Culture*. This component focuses on the principal's influence in advocating, nurturing, and sustaining a school and/or district culture and instructional programs conducive to student learning and staff professional growth.

Criteria: The following criteria are used to evaluate the performance of the principal.

2. Culture of Learning

a. Advocating a Culture of Learning

Principal provides leadership for assessing, developing, and improving the school and/or district culture and instructional program that is conducive to student learning. Principal articulates the desired school and/or district instructional program and shows evidence about how he or she reinforces the instructional program and culture.

b. Monitoring the Culture of Learning

Principal participates in monitoring and evaluating the effectiveness of the curriculum, instruction, or assessment of students. Principal evaluates staff and provides ongoing coaching for improvement. Principal uses a variety of sources of information to make decisions.

c. Sustaining the Culture of Learning

Principal helps to ensure that staff has professional growth opportunities that enhance their performance and improve student learning. Principal is accessible and approachable by staff, families, and community and is visible in the school or district community. Principal supports the use of technology as appropriate in teaching and learning.

d. Maintaining the Culture of Learning

Principal systematically and fairly recognizes accomplishments of staff and students toward a positive school and/or district culture. Principal uses and analyzes data to instill the importance of continually developing programs and strategies to enhance opportunities for learning.

Assessment

Component Two is assessed through

- A review of the evidence provided by the principal.
- Conferences between the evaluator and the principal.
- Implementing the district educator evaluation system in accordance with its intent.



Possible Sources of Evidence

- Faculty Handbook
- Student Handbook
- Professional growth schedule
- Meeting agendas
- Emails and memos to staff
- Parent newsletters
- Calendars



Component Three: Management

ISLLC Standard Three: Management of Learning

Overview

Component Three: *Management*, focuses primarily on ISLLC Standard Three: *Management of Learning*. Due to an increasing focus on instructional leadership and continuous improvement, principals are transitioning from their traditional role of educational manager to instructional leader. It is essential that the school and/or district is managed as a safe, efficient, and effective learning environment. The focus for this section is management of the school and/or district to support student learning and building a culture that encourages and supports student learning. Focusing on maintaining current and previous improvements is also part of Component Three.

Criteria: The following criteria are used to evaluate the performance of the principal.

3. Management

a. Solving Problems or Concerns

Principal addresses and resolves issues as they arise, in a timely manner, and works to prevent potential problems. Operational procedures are designed and managed to maximize opportunities for learning for all students.

b. Managing Resources

Principal manages fiscal and physical resources responsibly, efficiently, and effectively. Principal protects instructional time by managing operational procedures to maximize learning. Principal efficiently manages his or her time so that teaching and learning are a high priority.

c. Complying with Policies and Procedures

Principal complies with federal and state law and district policies. School and/or district contractual agreements are effectively managed. Principal maintains confidentiality and privacy of school and/or district records, including student or staff information.

d. Protecting the Welfare and Safety of Students and Staff

Principal works to ensure a safe and secure school and/or district environment and a culture that is conducive to teaching and learning. Challenges that could potentially interrupt teaching and learning are addressed and resolved.

Assessment

Component Three is assessed through a review of evidence provided by the principal. This is obtained through conferences between the evaluator and the principal.



Areas assessed in this section include

- School and/or district safety and security plans and their implementation
- Scheduling of students to ensure equitable access for all students to challenging courses
- Supervision of students to ensure a safe, orderly environment
- Fidelity of implementation of curriculum and instructional programs
- Supervision and evaluation of teachers and other staff to ensure that the curriculum and instructional strategies are appropriate for all students
- Procedures and policies that support student achievement
- Allocation of funding and other resources that support student achievement and equity
- Effectiveness and efficiency of programs under the principal's responsibilities and leadership according to, but not limited to, job descriptions

Possible Sources of Evidence

- School and/or district safety plans
- School schedules
- School and/or district budget
- Discipline procedures
- Faculty meeting agendas
- Agendas of curriculum review meetings
- School and/or district policies and procedures



Component Four: Professional Responsibilities
ISLLC Standard Four: Family and Community
ISLLC Standard Five: Ethics
ISLLC Standard Six: Societal Context

Overview

Component Four, *Professional Responsibilities*, is aligned with ISLLC Standard Four: *Relationship with the Community that Fosters Learning*; Standard Five: *Integrity, Fairness, and Ethics in Learning*; and Standard Six: *The Political, Social, Economic, Legal, and Cultural Context of Learning*. Component Four focuses on the principal's interaction with staff and the community. It is also concerned with the principal's fairness and consistency in dealing with students and staff. A commitment to continuous professional growth is also a focus of Component Four.

Criteria: The following criteria are used to evaluate the performance of the principal.

4. Professional Responsibilities

a. Maintaining Professional Relationships

Principal fosters and maintains positive professional relationships with staff. Principal is respectful of others' opinions and demonstrates an appreciation for and sensitivity to diversity in the school and/or district community.

b. Promoting Family and Community Involvement

Principal collaboratively works to establish a culture that encourages and welcomes families and community members and seeks ways in which to engage them in student learning.

c. Demonstrating Fairness

Principal is fair and consistent when dealing with students and staff. Principal demonstrates values, beliefs, and attitudes that inspire all students and staff to higher levels of performance.

d. Growing and Developing Professionally

Principal chooses and participates in professional growth that is aligned with his or her professional needs or aligned with the needs of the school and/or district.

Assessment

The evidence for the appraisal of Component Four is derived from the Professional Responsibilities and Goal(s) Form completed by the principal at the beginning of school year, and before the Summative Evaluation Conference each year.



Professional Responsibilities Reporting Key Areas

- Maintenance of professional relationships with staff and demonstration of sensitivity to diversity with the school and community.
- Working collaboratively with staff, faculty, families and community, and encouraging family and community involvement.
- Dealing fairly and consistently with school community.
- Engagement in goal-aligned professional growth activities.

Possible Sources of Evidence

The Professional Responsibilities and Goal(s) Form is the primary source of evidence for Component Four.

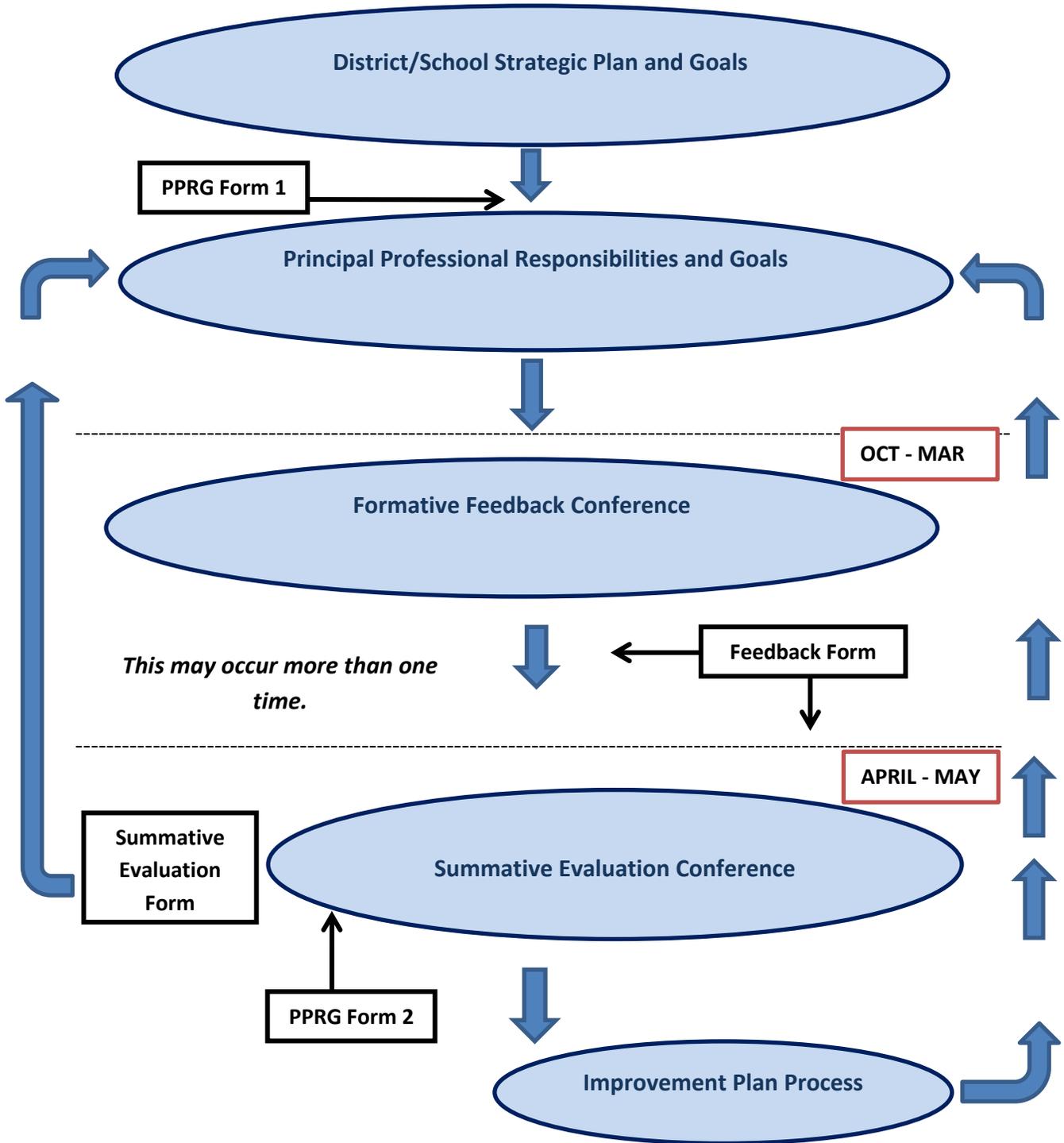
- Parent newsletters
- Descriptions of parent engagement programs
- Agendas or other evidence from Parent Information Events
- Professional learning certificates of participation and/or grade transcripts
- Individual professional growth plans



Montana Educator Performance Appraisal System Cycle

(Montana-EPAS – Principal Cycle)

AUG - SEPT



KEY

FORMS

Process/Conferences



Appraisal Cycle Elements for Principal Evaluation

Montana-EPAS for Principals is a continuous improvement model. The cycle is ongoing throughout the employment of the principal.

Components

1. Vision and Goals
2. Culture of Learning
3. Management
4. Professional Responsibility

Processes and Conferences

Professional Responsibilities and Goal(s) Conference

Formative Feedback Conference

Summative Evaluation Conference

Frequency of Conferences

Principal conferences will typically occur at least three times over the one-year evaluation cycle.

- Summer: agreement on professional responsibilities and goal(s) that are placed on the Professional Responsibilities and Goal(s) Form by the principal.
- Mid-year: progress discussions followed by completion of a Formative Feedback Form.
- Spring: summative conference, followed by completion of the Summative Evaluation Form.

Forms

Professional Responsibility and Goal(s) Form – Principal

Formative Feedback Form – Evaluator

Summative Evaluation Form – Evaluator

Improvement Plan – Principal and Evaluator



Montana Educator Performance Appraisal System (Montana-EPAS)

Process-at-a-Glance Principal Appraisal Cycle

- 1. District/School Strategic Plan and Goal Setting**
- 2. Principal Professional Responsibilities and Goals**
 - a. Professional Responsibilities and Goal(s) Form (Section 1)**
 - b. Professional Responsibilities and Goal(s) Conference**
 - c. Professional Responsibilities and Goal(s) Form (Section 2)**
- 3. Formative Evaluation**
 - a. Formative Conference**
 - b. Formative Feedback Form**
- 4. Summative Evaluation**
 - a. Summative Conference**
 - b. Summative Evaluation Form**
- 5. Improvement Plan**



Step-by-Step Principal Evaluation Process

District/School Strategic Plan and Goal Setting

District/School-Wide Goal-Setting

At the beginning of the new school year, the superintendent/principal reviews the district/school strategic plan with staff. The administrators and teachers examine district/school-wide data and other information relevant to the goals of the district/school strategic plan. Teachers have access to district/school data as well as current student data from the prior spring's state assessment.

Principal Professional Responsibilities and Goal(s)

Purpose

Setting goals for student and self-improvement is an important part of every educator's work. Clear measurable goals provide a road map for staff, teachers and students.

Process

Professional Responsibilities and Goal(s) Form (Section 1)

Principal completes individual Professional Responsibilities and Goal(s) Form, Section 1 and submits to evaluator prior to the Professional Responsibilities and Goal(s) Conference.

It is recommended that new principals complete the Professional Responsibilities and Goal(s) Form within one month of employment.

Professional Responsibilities and Goal(s) Conference

Evaluator meets with principal to initiate the discussion about professional responsibilities and goal(s).

Professional Responsibilities and Goal(s) Form (Section 2)

Principal compiles evidence of performance for all components throughout the school year. Evidence represents the principal's ongoing work throughout the year.

Principal documents progress on professional responsibilities and individual goals and completes Section 2 of the Professional Responsibilities and Goal(s) Form, which is provided to the evaluator prior to the Summative Evaluation Conference.



Formative Feedback

Formative feedback consists of the Formative Conference and completion of the Formative Feedback Form. All four Montana-EPAS components are addressed.

Formative Conference

The Formative Conference is held mid-year to discuss progress toward goals, review the Professional Responsibilities and Goal(s) Form, and other issues of interest or concern.

Formative Feedback Form

The Formative Feedback Form is used to record the content of conferences held and to note goals or performance expectations agreed upon. Other pertinent information that either party wishes to add is recorded and included on the Formative Feedback Form.

Following the conference, the evaluator completes a Formative Feedback Form and forwards it to the principal within a recommended ten (10) working days of the conference.



Summative Evaluation (All Components)

The Summative Evaluation covers Components One through Four of the evaluation and includes all the forms completed by both the principal and the evaluator over the course of the evaluation cycle. Also included in the Summative Evaluation is the content of conferences held during the evaluation cycle.

Summative Conference

Principal evaluation cycle consists of one school-year.

- The principal completes the Professional Responsibilities and Goal(s) Form and submits it to the evaluator before the goal setting conference.
- The evaluator and the principal conference is held prior to the beginning of school to discuss professional responsibilities and goal(s).
- The evaluator and the principal meet for a Formative Conference at least once, generally mid-year, to discuss professional responsibilities, progress toward goal, and other issues of concern.
- The evaluator completes the Formative Feedback Form and forwards it to the principal within a recommended ten (10) days of the Formative Conference.
- The principal completes Section 2 of the Professional Responsibilities and Goal(s) Form prior to the Summative Conference.
- The Summative Conference is held at the end of the cycle. All of the documents, evidence, and discussions that took place during the cycle may become part of the Summative Evaluation.
- Within a recommended ten (10) days, the evaluator completes the Summative Evaluation Form and forwards it to the principal. The Summative Conference sets the stage for the development of goals for the ensuing year.

Summative Evaluation Form

Purpose

- The Summative Evaluation Form provides written feedback about the performance of the principal related to all four components of Montana-EPAS and the principal's goals.
- The Summative Evaluation Form is a written record of the conversations which took place during the Summative Conference. All of the evidence submitted in support of all four components and the principal's goal(s), as well as all conferences and written documents generated during the evaluation cycle may be considered when completing the Summative Form.
- The content of the form is based on the evidence from conferences, artifacts presented and forms completed by both principal and evaluator.
- The Summative Evaluation Form includes the evaluator ratings of principal performance on each component of Montana-EPAS, and an overall rating of principal performance.



Descriptions of four overall ratings

Exemplary - Evidence of exceptional performance; outstanding knowledge, implementation, and integration of leadership standards along with evidence of leadership initiative and willingness to model and/or serve as a mentor for colleagues.

Proficient - Evidence of solid performance; strong knowledge, implementation, and integration of leadership standards; clear evidence of proficiency and skill in the component/criterion.

Developing - Evidence of novice performance; fundamental knowledge and implementation of leadership standards. Integration of leadership standards is inconsistent. Principal is making progress towards proficiency.

Unsatisfactory - Little or no knowledge and minimal implementation of leadership standards. Does not meet minimal leadership standards and needs substantial improvement.



Improvement Plans

An improvement plan may be developed for a principal who receives an overall rating of “Unsatisfactory” on any component on the Summative Evaluation Form.

Improvement Plan Form

Improvement Plans must include the following

- Identification of the specific area(s) for improvement and recommended area(s) for growth.
- Measurable goals for improving the area(s) for improvement to satisfactory levels.
- Clear and specific professional growth activities to accomplish the goal(s).
- Resources for each professional growth activity must be identified and made accessible to the principal.
- Procedures and evidence that must be provided and/or behaviors to determine that the goal(s) were met.
- Timelines, including intermediate progress checkpoints and a final completion date, must be specified.
- Record of judgment and date completed, signed by the principal and evaluator.

Process

- The evaluator and the principal will cooperatively develop the plan.
- If the plan cannot be cooperatively developed, the evaluator determines the plan.
- The principal is held accountable for the implementation and completion of the Improvement Plan.
- Upon completion of the Improvement Plan, the principal and the evaluator will sign the documentation that determines the satisfactory or unsatisfactory completion of the plan.



MONTANA EDUCATOR PERFORMANCE APPRAISAL SYSTEM (MONTANA-EPAS)

A State Model for Principal Evaluation

Principal Evaluation Forms

June 2013



**Montana
Office of Public Instruction
Denise Juneau, State Superintendent**



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Notes



PRINCIPAL PROFESSIONAL RESPONSIBILITIES AND GOAL(S) FORM

Principal	<input type="text"/>	School Year	<input type="text"/>
School	<input type="text"/>	Date	<input type="text"/>

SECTION 1

Principal develops one to four goals, completes Section 1 of the form and brings the completed form to the Professional Responsibilities and Goal(s) Conference.

August - September

1.1 Using the goals from the school and/or district improvement plan, identify area(s) of need you will focus on during this school year.

1.2 Identify the measurable indicator(s) and methods of measurement you will use to show student progress in the area(s) identified in 1.1.

1.3 List professional learning activities that you will engage in and describe how these activities align to your professional needs and those of the school and/or district?



PRINCIPAL PROFESSIONAL RESPONSIBILITIES AND GOAL(S) FORM

1.4 How do you plan to welcome and engage families in student learning?

Date of Conference

Principal Signature

Date

Evaluator Signature

Date



PRINCIPAL PROFESSIONAL RESPONSIBILITIES AND GOAL(S) FORM

SECTION 2

Complete Section 2 of the Professional Responsibilities and Goal(s) Form and provide a copy to your evaluator prior to the Summative Conference. Attach applicable documents.

April - May

2.1 Summarize your school and/or district progress in the area(s) of need as shown by the indicators identified in the beginning of the school year in Section 1.1.

2.2 If you met your goal(s), what conditions were most helpful? If you did not meet your goal(s), what were your obstacles or barriers?

2.3 Describe how you maintain professional relationships with staff and how you demonstrate sensitivity to diversity within the school and the community.



PRINCIPAL PROFESSIONAL RESPONSIBILITIES AND GOAL(S) FORM

2.4 Explain how you work collaboratively with staff, faculty and community to establish a culture that encourages and welcomes families and community members. How do you encourage families and communities to engage in student learning?

2.5 Explain how you deal fairly and consistently with students and staff. Provide evidence of expression of your values, beliefs and attitudes that inspire students and staff to higher levels of performance.

2.6 Provide evidence of the professional learning activities that you participated in and how they align to your professional needs and those of the school and/or district.

Date of Conference

Principal Signature

Date

Evaluator Signature

Date



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PRINCIPAL FORMATIVE FEEDBACK FORM

Principal	<input type="text"/>	School Year	<input type="text"/>
School	<input type="text"/>	Date	<input type="text"/>

This form is used to record the content of conferences, agreed upon goals or performance expectations, and other pertinent information either party wishes to record.

Component One: Vision and Goals

Narrative

Component Two: Culture of Learning

Narrative



PRINCIPAL FORMATIVE FEEDBACK FORM

Component Three: Management

Narrative

Component Four: Professional Responsibilities

Narrative

Summary

Principal and evaluator sign the Formative Feedback Form to indicate that the form was reviewed and discussed, not that the principal necessarily agrees with the observation or comments on this form.

Principal Signature

Date

Evaluator Signature

Date



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**PRINCIPAL SUMMATIVE FEEDBACK FORM
(All Components)**

Principal <input style="width: 100%;" type="text"/>	School Year <input style="width: 100%;" type="text"/>
School <input style="width: 100%;" type="text"/>	Date <input style="width: 100%;" type="text"/>

COMPONENT ONE: VISION AND GOALS

- Principal, in collaboration with others, such as the school or district improvement team or board, uses multiple sources of information and assists in analyzing data to establish rigorous and concrete school and/or district improvement goals in the context of student achievement and instructional programs.
- Principal provides leadership for major initiatives and change efforts relative to the school and/or district improvement goals. Principal is committed to doing the work required for continuous school and district improvement.
- Principal promotes high expectations for teaching and learning. Principal is committed to ensuring that all students have the knowledge and skills necessary to become successful in future educational activities.
- Principal communicates effectively to appropriate stakeholders about progress toward meeting the school and/or district improvement plan goals. Principal participates in a process to regularly monitor, evaluate and revise school and/or district improvement goals.

COMMENDATIONS/RECOMMENDED AREA(S) OF GROWTH

Exemplary

Proficient

Developing

Unsatisfactory



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PRINCIPAL SUMMATIVE FEEDBACK FORM (All Components)

COMPONENT TWO: CULTURE OF LEARNING

- Principal provides leadership for assessing, developing, and improving the school and/or district culture and instructional program that is conducive to student learning. Principal articulates the desired school and/or district instructional program and shows evidence about how he or she reinforces the instructional program and culture.
- Principal participates in monitoring and evaluating the effectiveness of the curriculum, instruction, or assessment of students. Principal evaluates staff and provides ongoing coaching for improvement. Principal uses a variety of sources of information to make decisions.
- Principal helps to ensure that staff has professional growth opportunities that enhance their performance and improve student learning. Principal is accessible and approachable by staff, families, and community and is visible in the school or district community. Principal supports the use of technology as appropriate in teaching and learning.
- Principal systematically and fairly recognizes accomplishments of staff and students toward a positive school or district culture. Principal uses and analyzes data to instill the importance of continually developing programs and strategies to enhance opportunities for learning.

COMMENDATIONS/RECOMMENDED AREA(S) OF GROWTH

Exemplary

Proficient

Developing

Unsatisfactory



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PRINCIPAL SUMMATIVE FEEDBACK FORM (All Components)

COMPONENT THREE: MANAGEMENT

- Principal addresses and resolves issues as they arise, in a timely manner, and works to prevent potential problems. Operational procedures are designed and managed to maximize opportunities for learning for all students.
- Principal manages fiscal and physical resources responsibly, efficiently, and effectively. Principal protects instructional time by managing operational procedures to maximize learning. Principal efficiently manages his or her time so that teaching and learning are a high priority.
- Principal complies with federal and state law and district policies. School and/or district contractual agreements are effectively managed. Principal maintains confidentiality and privacy of school and/or district records, including student or staff information.
- Principal works to ensure a safe and secure school and/or district environment and a culture that is conducive to teaching and learning. Challenges that could potentially interrupt teaching and learning are addressed and resolved.

COMMENDATIONS/RECOMMENDED AREA(S) OF GROWTH

Exemplary

Proficient

Developing

Unsatisfactory



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PRINCIPAL SUMMATIVE FEEDBACK FORM (All Components)

COMPONENT FOUR: PROFESSIONAL RESPONSIBILITIES

- Principal fosters and maintains positive professional relationships with staff. Principal is respectful of others' opinions and demonstrates an appreciation for and sensitivity to diversity in the school and/or district community.
- Principal collaboratively works to establish a culture that encourages and welcomes families and community members and seeks ways in which to engage them in student learning.
- Principal is fair and consistent when dealing with students and staff. Principal demonstrates values, beliefs, and attitudes that inspire all students and staff to higher levels of performance.
- Principal chooses and participates in professional growth that is aligned with his or her professional needs or aligned with the needs of the school and/or district.

COMMENDATIONS/RECOMMENDED AREA(S) OF GROWTH

Exemplary

Proficient

Developing

Unsatisfactory



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**PRINCIPAL SUMMATIVE FEEDBACK FORM
(All Components)**

SUMMATIVE EVALUATION RATING

Exemplary

Proficient

Developing

Unsatisfactory

IMPROVEMENT PLAN REQUIRED FOR:

COMPONENT ONE

COMPONENT TWO



**PRINCIPAL SUMMATIVE FEEDBACK FORM
(All Components)**

COMPONENT THREE

COMPONENT FOUR

The principal and evaluator sign the Summative Evaluation Form to indicate that it was reviewed and discussed, not that the principal necessarily agrees with comments on this form.

Principal Signature Date

Evaluator Signature Date



PRINCIPAL IMPROVEMENT PLAN FORM

Principal School Year

Evaluator Date of Conference

Area(s) for Improvement

The principal and evaluator will collaboratively develop the Improvement Plan at an Improvement Plan Conference. If consensus between the principal and evaluator is not reached, the evaluator develops the Improvement Plan.

1. Identify specific Area(s) For Improvement (AFI) and recommended areas of growth related to one or more of the Montana-EPAS components.

2. List specific measurable goals for improving the AFI and recommended growth areas to satisfactory levels.



PRINCIPAL IMPROVEMENT PLAN FORM

3. Identify resources and strategies necessary to implement the Improvement Plan.

4. List evidence that must be submitted to evaluate growth and improvement of the identified AFI or recommended areas of growth.

5. Identify a timeline for completion of the Improvement Plan, along with times for intermediate checkpoints.



PRINCIPAL IMPROVEMENT PLAN FORM

6. Indicate how satisfactory performance as defined by the Improvement Plan will be determined.

My signature below means that I received the Improvement Plan, understand what is expected of me, and will work on the plan as described.

Principal Signature Date

My signature below means that I carefully reviewed the Improvement Plan with the principal and clearly communicated what is expected of the principal to complete the plan.

Evaluator Signature Date



PRINCIPAL IMPROVEMENT PLAN FORM

Amendments to the Improvement Plan

If the Improvement Plan is amended during the implementation, specify changes.

Principal Signature	<input type="text"/>	Date	<input type="text"/>
Evaluator Signature	<input type="text"/>	Date	<input type="text"/>

Completion of Improvement Plan

The principal has completed the improvement plan as described.

Satisfactory Unsatisfactory

Principal Signature	<input type="text"/>	Date	<input type="text"/>
Evaluator Signature	<input type="text"/>	Date	<input type="text"/>

