LETTER OF AGREEMENT
BETWEEN
PROFESSIONAL-TECHNICAL EMPLOYEES
ASSOCIATION
AND
FEDERAL WAY PUBLIC SCHOOLS

Appendix C of the current Collective Bargaining Agreement (CBA) between the Professional-Technical Employees Association and Federal Way Public Schools indicates, “Evaluation procedures may be modified as a result of the work of the joint evaluation committee. Changes agreed to by the parties will be implemented beginning with the 2017-2018 contract year” (page 34).

During the 2016-17 school year, a joint evaluation committee, made up of members from District and Association leadership met and created an evaluation process along with goal setting and evaluation forms as attached to this agreement.

The parties agree to replace Appendix C, in its entirety, with the process, evaluation form, and goal setting form created by the joint evaluation committee, as attached to this agreement, for implementation beginning September 1, 2017 for the 2017-2018 school year.

This agreement will be in effect upon signing by both parties through August 31, 2019. The parties further agree that it will be incorporated into the CBA at that point and/or modified as part of the contract negotiation process.

For Professional-Technical Employees Association

For Federal Way Public Schools

Date

Date
Professional-Technical Employees Association

Appendix C
Performance Evaluation

Section C.1 Evaluation Year Long Process. Professional-Technical Association employees will be evaluated by their direct supervisor or a designee assigned by their direct supervisor.

Section C.1.1 Start of year process. By September 30th Professional-Technical Association employees must be given the goal setting form found in Appendix C and evaluation form that includes job specific criteria written by the direct supervisor based on the employee’s job description. The employee must complete the goal-setting form prior to the “start of year” meeting with their direct supervisor or designee (from now on referred to as “evaluator”), which must occur by October 31st. Evaluator and employee will meet to share goals, job specific criteria, evaluation competencies, and the schedule for the evaluation process.

Section C.1.2 Mid-year process. A mid-year conference between the evaluator and employee for a formative evaluation using the Professional Technical Performance Evaluation form found in Appendix X must occur by January 31st. The formative conference is a “check-in conversation” between the employee and the evaluator and does not go into the employee’s personnel file.

a. For the formative evaluation, the evaluator scores each competency where evidence is sufficient to score.

b. Comments are optional except for competencies with a rating of Unsatisfactory (1). Competencies with a rating of Unsatisfactory (1) require a plan of support and/or evidence of what the evaluator needs to see for the employee to achieve a rating of Meets Basic Expectations (2) or Meets Full Expectations (3). The evaluator may choose to include the following in the plan of support:
   i. The identification of resources and support that are available, and
   ii. A timeline that outlines a reasonable timeframe and procedures for assessing progress.

c. The Overall Performance Rating is not calculated mid-year.

d. Goals should be reviewed for progress towards completion and may be adjusted if needed.

Section C.1.3 End of year process. Employees will have a summative evaluation annually using the Professional-Technical Performance Evaluation form found in Appendix C.

a. Summative written evaluations will be completed and distributed according to the following schedule:
   i. For twelve (12) month employees, no later than August 15th.
   ii. For less than twelve (12) month employees, no later than June 1st.

b. Goals should be discussed to determine if they were completed. If goals were not completed, the employee should share the reason why their goals were not met with the evaluator.

c. Comments are optional except for competencies with a rating of Unsatisfactory (1). Competencies with a rating of Unsatisfactory (1) require a plan of support and/or evidence of what the evaluator needs to see for the employee to achieve a rating of Meets Basic Expectations (2) or Meets Full Expectations (3). The evaluator may choose to include the following in the plan of support:
i. The identification of resources and support that are available, and
ii. A timeline that outlines a reasonable timeframe and procedures for assessing progress.

d. If an employee receives an overall evaluation that is unsatisfactory, the employee shall be provided with a copy of the evaluation at least one (1) day prior to the conference with the evaluator, exceptions to this one (1) day rule must be mutually agreed upon by the evaluator and the employee. The employee may request that an Association representative be present for this meeting.

e. The employee and evaluator will both sign the summative evaluation. This signature acknowledges the receipt of the evaluation only and does not signify agreement with the evaluation. The employee may submit a written response to their evaluator.

f. The evaluator will then submit the signed evaluation to the Human Resources department with any written response provided by the employee to Human Resources.

Section C.2 Probation Process. If an evaluator anticipates an unsatisfactory overall summative score at any time during the year and would consider termination based on performance, the following process must be followed:

a. The evaluator must first implement a plan of support, which shall include the provisions of Section C.1.2(b). The plan of support under Section C.1.2(b) shall include a schedule of conferences with the evaluator of not less than twice per month.

b. The evaluator must give written notice to the employee of the summative overall score they must achieve in order to retain their employment (Basic or Full) as part of the plan.

c. The employee and the evaluator shall sign documentation acknowledging each of these conferences.

d. The timeline under Section C.1.2(b) shall extend a maximum of sixty (60) working days.

e. At the end of this time-period, the employee will be re-evaluated using the Professional-Technical Performance Evaluation form found in Appendix C. The result of this summative evaluation will be either a satisfactory evaluation, an extended timeline for improvement to be made with the steps of this subsection continued, or a termination notice.

f. Employees are not eligible for a transfer while on probation.

g. No employee may be terminated for poor job performance unless the employer has followed the probation process within a twelve (12) month period.

h. Probation plans of support shall be provided to the Association within ten (10) business days of the employee being notified.

Section C.3

a. The evaluation provisions described above are for the purpose of dealing with performance-based concerns. They are not intended to be a requisite procedure for dealing with conduct that warrants discipline. In such cases, discipline will be administered in a manner that is reasonable and, if appropriate, progressive, based on the magnitude and the scope of the misconduct. The parties recognize that the line between unacceptable behavior and unacceptable performance can, at times, be imprecise. Therefore, the parties commit to work together to resolve disagreements regarding which procedures should apply. Terminations for performance are subject to the provisions of Article XII Discipline and Discharge of Employees.

b. Employees may file a grievance under Article XVI if they believe the evaluation process was not followed.
Employee Name: Date:

Type of Evaluation: ☐ Formative (Mid-Year) ☐ Summative (End of Year)

**PERFORMANCE EVALUATION INSTRUCTIONS**

For each competency, mark the rating that best describes the employee’s performance where evidence is sufficient to score. Comments are optional except for competencies with a rating of “1”. The Overall Performance Rating is only calculated on the Summative Evaluation. The Overall Performance rating is calculated by totaling the ratings of each competency. See Appendix C of the Professional-Technical Contractual Agreement for full guidelines.

**RATING SCALE**

<table>
<thead>
<tr>
<th>4 = Exceeds Expectations</th>
<th>3 = Meets Full Expectations</th>
<th>2 = Meets Basic Expectations</th>
<th>1 = Unsatisfactory</th>
</tr>
</thead>
<tbody>
<tr>
<td>All of “Meets Expectations” and in addition consistently exceeds job requirements.</td>
<td>Performance is what is expected of a fully qualified and experienced person in this position. All competencies are met. Consistently meets all performance expectations and standards. Job well done.</td>
<td>Competencies are generally met but full results are not yet totally achieved. Occasionally falls short of consistently meeting performance expectations and standards. Some performance aspects were met partially, incomplete, or not up to expectation. Continuing to learn aspects of the position.</td>
<td>Competencies are consistently not met. Employee consistently fails to meet performance expectations. Needs significant improvement. Excessive attention by supervisor is required. A plan of support is required.</td>
</tr>
</tbody>
</table>

**JOB TITLE**

Criteria (Written by HR & Direct Supervisor based on Job Description)

<table>
<thead>
<tr>
<th>1 - Unsatisfactory</th>
<th>2 - Meets Basic Expectations</th>
<th>3 - Meets Full Expectations</th>
<th>4 - Exceeds Expectations</th>
</tr>
</thead>
</table>

**COMPETENCIES**

**JOB EXPECTATIONS**

- Quality of performance
- Knowledge and ability of skills required
- Willingness to learn new skills

**INITIATIVE**

- Resourceful
- Gives input to decisions
- Self-starter and self-motivated
- Creates and completes quality goals

**COLLABORATION**

- Teamwork
- Takes on roles for team
- Works well with others

**ATTITUDE**

- Works well with others
- Flexible, adaptable, cooperative

Comments:
## DEPENDABILITY
- Punctual and on time
- Meets deadlines

### Comments:

## CULTURAL COMPETENCY
- Recognizes and respects cultural differences
- Assumes responsibility for supporting the social and emotional safety of all

### Comments:

## CUSTOMER RELATIONS
- Works professionally with staff, parents, students, and/or vendors

### Comments:

## CONFIDENTIALITY
- Follows FERPA laws
- Discloses information only with proper authorization

### Comments:

## PROBLEM SOLVING
- Solution-oriented
- Critical thinker
- Brings forth ideas for improvement

### Comments:

## COMMUNICATION
- Writes and communicates clearly, accurately, and respectfully

### Comments:

## TIME MANAGEMENT
- Meets deadlines
- Work is efficient, timely, and productive

### Comments:

<table>
<thead>
<tr>
<th>1 - Unsatisfactory</th>
<th>2 - Meets Basic Expectations</th>
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<tbody>
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<td></td>
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</table>

Unsatisfactory = 11-18  Basic = 19-29  Full = 30-41  Exceeds = 42-44

**OVERALL PERFORMANCE RATING:**

Evaluator Overall Comments:

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Employee's Signature  
Date

Evaluator's Signature  
Date
Employee Name: ____________________________  Meeting Date: ____________________________

Job Title: ____________________________  School Year: ____________________________

**Employee Goals**

Use this form to set goals for the year. During the formative and summative evaluation meetings, the employee will have the opportunity to share with the evaluator progress toward the goals set at the beginning of the year. Please set up to three (3) goals.

A good starting place for setting goals is to consider your accountabilities to support the goals for your department/school or the district, growth areas from previous evaluations, as well as what responsibilities make up the bulk of your work. In addition, consider what behaviors or skills are required to be successful and which of those you want to improve.

Consider goals that are related to your School Improvement Plan, department’s success, and/or the District Strategic Plan, as well as professional development that support your career.

The employee’s ability to set and meet goals will be assessed as part of the Initiative competency on the evaluation form.

The template below is designed to help you to creategoals.

<table>
<thead>
<tr>
<th>GOAL TEMPLATE</th>
</tr>
</thead>
<tbody>
<tr>
<td>Goal: What is your goal? (100 words or less.)</td>
</tr>
<tr>
<td>Actions: What specific activities are required to meet this goal?</td>
</tr>
<tr>
<td>Job Relevancy: How does this goal relate to your work and responsibilities?</td>
</tr>
<tr>
<td>Resources Needed: What do you need to accomplish the goal and/or activities/procedures?</td>
</tr>
<tr>
<td>Due Date: Choose a specific date when this goal should be successfully met or exceeded?</td>
</tr>
</tbody>
</table>

**GOAL #1**

| Goal: |  |
|-------|
| Actions: |  |
| Job Relevancy: |  |
| Resources Needed: |  |
| Due Date: |  |

**GOAL #2**

| Goal: |  |
|-------|
| Actions: |  |
| Job Relevancy: |  |
| Resources Needed: |  |
| Due Date: |  |

**GOAL #3**

| Goal: |  |
|-------|
| Actions: |  |
| Job Relevancy: |  |
| Resources Needed: |  |
| Due Date: |  |