

Year \_\_\_\_\_

Review: Mid-year  End-of-year

# EXECUTIVE LEADERSHIP PERFORMANCE REVIEW

Executive Leader (Name and Title): \_\_\_\_\_

Reviewer \_\_\_\_\_ Date \_\_\_\_\_

**Instructions:** Please circle/shade the performance rating for each area of responsibility. Descriptions of unsatisfactory, good, and exemplary performance are provided as a guide. Please use additional pages for evidence and comments as necessary. An overall description of the ratings and competency areas is provided for reference.

1

**Unsatisfactory:**  
Continuously fails to achieve basic requirements of role with no signs of improvement

2

**Needs improvement:**  
Must address clear development needs to become a strong leader and achieve unit objectives

3

**Good:**  
Handles issues and responsibilities within role and delivers on standard expectations; meets most unit objectives

4

**Very strong:**  
Mastery of role and contributions beyond role; meets almost all unit objectives

5

**Exemplary:**  
Strong leadership; serves as a role model for peers; exceeds unit objectives

Competency Area	Activities
Operations	<ul style="list-style-type: none"> <li>• Achieves unit performance objectives                             <ul style="list-style-type: none"> <li>- Develops short and long range plans and goals to meet objectives</li> <li>- Sets appropriate priorities of needs and activities and meets deadlines</li> <li>- Anticipates and prepares for future requirements and change</li> </ul> </li>   <li>• Develops and builds functional expertise                             <ul style="list-style-type: none"> <li>- Understands and executes core activities of function</li> <li>- Leads and trains others in core functional skills</li> </ul> </li> </ul>
Budget and resources	<ul style="list-style-type: none"> <li>• Manages resources                             <ul style="list-style-type: none"> <li>- Efficiently manages resources</li> <li>- Uncovers opportunities to decrease costs and improve productivity</li> </ul> </li>   <li>• Ensures efficient resource utilization among staff                             <ul style="list-style-type: none"> <li>- Trains employees how to access and utilize resources</li> <li>- Monitors employee resource utilization</li> </ul> </li> </ul>
People	<ul style="list-style-type: none"> <li>• Builds a high performing team                             <ul style="list-style-type: none"> <li>- Ensures every position is filled with a qualified employee</li> <li>- Creates opportunities for employees to share best practices</li> <li>- Provides coaching and training to meet employee development needs</li> <li>- Communicates accurate and timely information to staff</li> </ul> </li>   <li>• Collaborates effectively with colleagues                             <ul style="list-style-type: none"> <li>- Works across services organization to provide high quality customer service and solve problems</li> <li>- Communicates accurate and timely information to key stakeholders</li> <li>- Models professionalism, communication, and respect</li> </ul> </li> </ul>
Customer	<ul style="list-style-type: none"> <li>• Provides high quality customer service                             <ul style="list-style-type: none"> <li>- Anticipates and meets customer needs</li> <li>- Responds to customer questions and concerns</li> <li>- Builds customer service culture among staff</li> <li>- Communicates accurate and timely information to customers</li> </ul> </li> </ul>

# EXECUTIVE LEADERSHIP PERFORMANCE REVIEW

(CONTINUED)

## Operations

• Achieves unit objectives		
Unsatisfactory performance	Good performance	Exemplary performance
<ul style="list-style-type: none"> <li>- Meets few or no objectives</li> <li>- Does not consider future requirements and change</li> <li>- Does not set or meet deadlines</li> </ul>	<ul style="list-style-type: none"> <li>- Meets most performance objectives</li> <li>- Prepares for future requirements and change</li> <li>- Meets deadlines</li> </ul>	<ul style="list-style-type: none"> <li>- Exceeds unit performance objectives</li> <li>- Pro-actively anticipates and plans for future requirements and change</li> <li>- Meets and exceeds deadlines</li> </ul>
1	2	3
4	5	
Evidence:		
• Develops and builds functional expertise		
Unsatisfactory performance	Good performance	Exemplary performance
<ul style="list-style-type: none"> <li>- Lacks ability to execute core functional activities</li> <li>- Fails to train staff in functional skills</li> </ul>	<ul style="list-style-type: none"> <li>- Executes core functional activities</li> <li>- Adequately trains staff in functional skills</li> </ul>	<ul style="list-style-type: none"> <li>- Excels at core functional activities</li> <li>- Builds functional expertise among staff members</li> </ul>
1	2	3
4	5	
Evidence:		

# EXECUTIVE LEADERSHIP PERFORMANCE REVIEW

(CONTINUED)

## Budget

• <b>Managing resources</b>				
Unsatisfactory performance	Good performance		Exemplary performance	
– Does not make the best use of given resources	– Efficiently allocates resources for core activities		– Identifies innovative methods for maximizing resources	
1	2	3	4	5
<b>Evidence:</b>				

• <b>Ensuring efficient resource utilization among staff</b>				
Unsatisfactory performance	Good performance		Exemplary performance	
– Does not train employees in resource utilization – Tolerates waste and inefficiency among staff members	– Trains employees how to access and utilize resources – Monitors employee resource utilization		– Creates culture of innovative resource maximization among staff	
1	2	3	4	5
<b>Evidence:</b>				

# EXECUTIVE LEADERSHIP PERFORMANCE REVIEW

(CONTINUED)

## People

• Collaborates effectively with colleagues				
Unsatisfactory performance	Good performance	Exemplary performance		
<ul style="list-style-type: none"> <li>- Fails to focus on service unit improvement</li> <li>- Does not collaborate well with other service units and areas</li> <li>- Does not provide accurate and timely communication</li> <li>- Does not treat others with respect</li> </ul>	<ul style="list-style-type: none"> <li>- Shares best practices and collaborates with others to improve overall service area performance</li> <li>- Communicates accurate and timely information</li> <li>- Treats others with respect</li> </ul>	<ul style="list-style-type: none"> <li>- Proactively identifies opportunities for improvement across in own unit and across services organization</li> <li>- Models professionalism and respect for others</li> </ul>		
1	2	3	4	5
Evidence:				
• Builds high performing team				
Unsatisfactory performance	Good performance	Exemplary performance		
<ul style="list-style-type: none"> <li>- Fails to fill open positions in a timely manner</li> <li>- Does not develop employees to succeed in their role</li> <li>- Does not provide adequate feedback, coaching, or performance review</li> <li>- Does not provide timely and accurate information</li> </ul>	<ul style="list-style-type: none"> <li>- Ensures there is a qualified employee in every position</li> <li>- Provides appropriate training and individualized growth plans</li> <li>- Provides timely feedback and coaching</li> <li>- Executes performance review process with actionable next steps</li> <li>- Communicates well with staff</li> </ul>	<ul style="list-style-type: none"> <li>- Pro-actively and quickly recruits and hires outstanding employees</li> <li>- Provides outstanding coaching and training</li> <li>- Sets an example for performance review process and action planning</li> <li>- Pro-actively communicates key information</li> </ul>		
1	2	3	4	5
Evidence:				

# EXECUTIVE LEADERSHIP PERFORMANCE REVIEW

(CONTINUED)

## Customer

• Providing high quality customer service				
Unsatisfactory performance	Good performance		Exemplary performance	
<ul style="list-style-type: none"> <li>- Does not meet customer needs</li> <li>- Unresponsive to customer questions and concerns</li> <li>- Ignores customer complaints</li> <li>- Does not provide accurate and timely information to customers</li> <li>- Does not contribute to customer service culture</li> </ul>	<ul style="list-style-type: none"> <li>- Responds to customer questions and concerns</li> <li>- Adequately resolves customer complaints</li> <li>- Communicates accurate and timely information to customers</li> <li>- Contributes to customer service culture</li> </ul>		<ul style="list-style-type: none"> <li>- Anticipates and meets customer needs</li> <li>- Avoids or quickly resolves customer complaints</li> <li>- Pro-actively communicates key information to customers</li> <li>- Builds customer service culture among staff</li> </ul>	
1	2	3	4	5
Evidence:				

## Overall performance summary

1	2	3	4	5
<b>Unsatisfactory</b>	<b>Needs improvement</b>	<b>Good</b>	<b>Strong</b>	<b>Exemplary</b>

<b>Key strengths</b>	<b>Development needs</b>
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Executive Leader signature \_\_\_\_\_ Date \_\_\_\_\_  
 (Signature indicates receipt of performance review, not agreement or disagreement.)

Supervisor signature \_\_\_\_\_ Date \_\_\_\_\_

# EXECUTIVE LEADERSHIP DEVELOPMENT PLAN

## Priorities for unit improvement

Please indicate key areas of focus and specific next steps for improving unit performance. Choose 1-3 goals.

Goals – Aligned with District Academic Goals	Specific action steps
(Identify how you will measure success)	

## Priorities for personal professional development

Please indicate the manager's critical development needs and corresponding actions to address those needs. Choose 1-3 goals.

Development goals	Specific action steps
Operations <ul style="list-style-type: none"> <li>•</li> <li>•</li> <li>•</li> </ul> Budget <ul style="list-style-type: none"> <li>•</li> <li>•</li> <li>•</li> </ul> People <ul style="list-style-type: none"> <li>•</li> <li>•</li> <li>•</li> </ul> Customer <ul style="list-style-type: none"> <li>•</li> <li>•</li> <li>•</li> </ul>	

# EXECUTIVE LEADERSHIP PERFORMANCE EVALUATION\*

\* Strategy Group members and Chief/Executive Officers

## Process and Timeline

ACTION STEP	TIMELINE	Sign-off/Date
1. Evaluator reviews individual performance review timeline, process, and forms; and district academic goals with evaluatee.	1. At hiring and by 8/15 each year	Sign-off: _____/_____ Date: _____
2. Evaluatee and evaluator discuss prior year goals and performance	2. End of August	Sign-off: _____/_____ Date: _____
3. Evaluatee identifies district and personal development goals and strategies for upcoming year; completes Planning Form.	3. 2 <sup>nd</sup> week September	Sign-off: _____/_____ Date: _____
4. Evaluatee and evaluator discuss and finalize goals and strategies for upcoming year.	4. End of September	Sign-off: _____/_____ Date: _____
5. Evaluatee and evaluator check-in around goals and strategies using Alignment Log. The evaluator may complete a conference summary as needed.	5. Mid-November	Sign-off: _____/_____ Date: _____
6. Evaluatee and evaluator check-in around goals and strategies using Alignment Log. The evaluator may complete a conference summary as needed.	6. End of January	Sign-off: _____/_____ Date: _____
7. Determine list for March 15 notifications.	7. Early March	Sign-off: _____/_____ Date: _____
8. Evaluatee and evaluator check-in around goals and strategies using Alignment Log mid-April. The evaluator may complete a conference summary as needed.	8. Mid-April	Sign-off: _____/_____ Date: _____
9. Evaluatee and evaluator each assess performance using end-of-year Performance Evaluation Form; meet for end-of-year performance evaluation and discuss ratings, accomplishments, challenges, lessons learned, questions and next steps for improved effectiveness.	9. End of June	Sign-off: _____/_____ Date: _____

*A Reflection Form is provided to assist with preparation for the annual evaluation meeting.*

***The timeline is suggested; specific dates will vary year-to-year.***



## OUSD ACADEMIC GOALS

- Each student that stays with the district continuously for five years will **achieve at or above grade level in math and English-language arts.**
  - Each student starting out the year below grade level will earn a CST scale score increase of 20 points or more in math and ELA.
  - Each student starting out the year at or above grade level will earn a CST scale score increase of 10 points or more in math and ELA.
  
- Each high school student enrolled in the district continuously for at least three years will **pass CAHSEE** by the fall of 12th grade.
  - The percentage of 10<sup>th</sup> grade students who pass CAHSEE on the first try will increase by at least 5% points each year until at least 80% pass on the first try.
  - The percentage of 10<sup>th</sup> grade students passing CAHSEE with a scale score of 380 or higher will increase by at least 5% points each year until at least 70% earn a score of 380 or higher on the first try.
  
- Each English learner student will develop **English proficiency** within five continuous years of OUSD enrollment.
  - Each EL student will show a gain on the overall CELDT score each year.
  
- The percentage of graduates who demonstrate **exemplary academic achievement** will accelerate.
  - The percentage of students who graduate college-ready will steadily increase.
  
- **African American, Latino, Southeast Asian, and English learner students will make accelerated and consistent gains** on all academic measures.
  - Sub-groups historically most failed by the schools will outpace the gain of other groups on all measures.

September 8, 2005



Year: \_\_\_\_\_ Evaluatee (name and role): \_\_\_\_\_

Date Completed: \_\_\_\_\_ Evaluator (name and title): \_\_\_\_\_

## Executive Leadership Performance Planning Form

### Priorities for district improvement

Please indicate key district goals and improvement areas with specific actions to meet targets.

Goals and targets aligned with District goals <i>(identify how you will measure success for each)</i>	Specific action steps

### Priorities for personal professional development

Please indicate key personal professional development goals and corresponding specific actions.

Personal Professional Development Goals <i>(identify how you will measure success for each)</i>	Specific action steps

Year: _____	Evaluatee (name and role): _____
Date Meeting: _____	Evaluator (name and title): _____

## Performance Supervision Alignment Log

Please complete this form each time you conference with your supervisor to help align your day-to-day efforts with your planned goals, targets, and strategies Use as many pages as needed.

### District or Professional Development Goal Discussed:

Accomplishments, promising practices/developments, challenges, lessons learned, questions, next steps, etc.:

### Evidence

**Executive Leadership Performance Review**

Year: \_\_\_\_\_ Evaluator Name: \_\_\_\_\_  
Date Completed: \_\_\_\_\_ Person Completing Form: \_\_\_\_\_

## PERFORMANCE EVALUATION REFLECTION FORM

Please review your goals and action steps and your three alignment logs. Identify key accomplishments, challenges, lessons learned, and questions. Identify evidence (information, data) that supports your observations.

### District academic goals/targets

District academic goals/targets			
Accomplishments	Challenges	Lessons Learned	Questions

### EVIDENCE

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**Executive Leadership Performance Review**

Year: \_\_\_\_\_ Evaluator Name: \_\_\_\_\_

Date Completed: \_\_\_\_\_ Person Completing Form: \_\_\_\_\_

## PERFORMANCE EVALUATION REFLECTION FORM

Please review your goals and action steps and your three alignment logs. Identify key accomplishments, challenges, lessons learned, and questions. Identify evidence (information, data) that supports your observations.

### Personal Professional Development Goals

Accomplishments	Challenges	Lessons Learned	Questions

### EVIDENCE

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