

# Principal Evaluation Toolkit: Performance Evaluation Form

Created/Distributed by: The Office of Parish and School Human Resources  
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## Parish and School HR Helpline

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Review Date \_\_\_\_\_

Review Period (From/To) \_\_\_\_\_

Principal Name \_\_\_\_\_

Principal Time in Role \_\_\_\_\_

Supervisor \_\_\_\_\_

Supervisor Title \_\_\_\_\_

### Purpose:

The Principal Evaluation Toolkit provides a process for periodic discussion about each principal's accomplishments and challenges that are related to his or her job. It provides a range of domains to help a supervisor and principal organize his or her observations, to assess individual performance in relation to standards for the job, to note aspects of work in which the principal does well, to note any areas needing improvement, and most importantly to support the professional growth of the principal. The evaluation provides an occasion for the principal and the supervisor to reach/renew a mutual understanding of the job position's objectives and the principal's role. Work standards can be clarified, training needs discussed, and the effects of changes in the scope of work noted.

### Procedure:

1. Principal and supervisor meet regularly (i.e., minimum monthly) discussing performance throughout the year.
2. Principal and supervisor meet to review evaluation process by *<insert date, ex: Sept 15>*.
3. For principal self-evaluation purposes, supervisor distributes performance review forms (Principal Effectiveness Framework Summative Evaluation and Principal Performance Evaluation Form) to the principal on *<insert date, ex: Jan 15>*.
4. Principal completes and submits self-evaluation (Principal Effectiveness Framework Summative Evaluation) to supervisor by *<insert date, ex: Jan 30>*.
5. Supervisor completes Principal Evaluation Form by *<insert date, ex: Feb 14>*.
6. Principal and supervisor complete face-to-face review meeting by *<insert date, ex: Feb 28>*.
7. Principal submits new annual goals to supervisor by *<insert date, ex: March 15>*.
8. If performance evaluation is tied to compensation, supervisor submits wage changes to business manager by *<insert date, ex: March 30>*.
9. If applicable, supervisor/ business manager issue next year's contract reflective of applicable wage changes by *<insert date based on current year contract date in #5 of "Both Parties Agree", ex: April 15>*.

### Scale:

Evaluate principal on each domain and provide comments on specific performance situations to clarify ratings.

**NOTE: All ratings of '1', '2', or '4' must provide specific examples of behavior exemplifying rating.**

- 1 –Expectations of job were not met. (Unsatisfactory)
- 2 –Expectations of job were not met consistently. (Developing)
- 3 –Expectations of job were met consistently. (Expected)
- 4 –Expectations of job were exceeded consistently. (Exemplary)

### Performance Domains:

Note: The performance domains are based on the 2023 *National Standards and Benchmarks for Effective Catholic Elementary and Secondary Schools* and in alignment with the *Archdiocese of Milwaukee Principal Effectiveness Framework*.

1. Mission and Catholic Identity
2. Governance and Leadership
3. Academic Excellence
4. Operational Vitality

**Domain 1: Mission and Catholic Identity-** The extent to which the principal collaborates appropriately with the governing body and leadership team of the school (i.e., pastor or president, board of directors, etc.), to:

- Ensure the school and all employees are guided and driven by a clearly communicated mission statement, Catholic identity rooted in Gospel values, and the sacramental life of the Church and the liturgical seasons, and are committed to faith formation, academic excellence, and service,
- Ensure the school is providing a rigorous academic program for religious studies and catechesis in the Catholic faith, set within a total academic curriculum that integrates faith, culture, life, and facilitates encounters with Jesus Christ,
- Ensure faculty who teach religion meet the religious certification requirements of the Archdiocese of Milwaukee,
- Ensure Catholic faith and culture are integrated throughout the school's curriculum, programming, environment and all extra-/co-curricular activities,
- Ensure the school is providing timely, regular, and age-appropriate opportunities within and outside the classroom for students to grow closer to Jesus Christ through faith formation, participation in liturgical and communal prayer, and action based on Catholic Social Teachings, and
- Ensure regular opportunities for developing and strengthening collaborations with parishes and other Catholic institutions and organizations.

Rating (1,2, 3, or 4) = \_\_\_\_\_

Supervisor Comments/Examples:

**Domain 2: Governance and Leadership-** The extent to which the principal collaborates appropriately with the governing body and leadership team of the school (i.e., pastor or president, board of directors, etc.), within the context of mutual respect and recognition of legitimate authority to:

- Exercise responsible decision-making for the development and oversight of the school's fidelity to mission; support for justice, equality, and equity; academic excellence, and operational vitality,
- Implement the school's mission and vision in dynamic and evolving ways in all aspects of school life, and
- Establish and support network of collaboration and communication with all stakeholders within the school community to advance excellence

Rating (1,2, 3, or 4) = \_\_\_\_\_

Supervisor Comments/Examples:

**Domain 3: Academic Excellence-** The extent to which the principal collaborates appropriately with the governing body and leadership team of the school (i.e., pastor or president, board of directors, etc.) to:

- Ensure the school has a clearly articulated, rigorous curriculum aligned with the Archdiocese of Milwaukee standards and Gospel values, and implemented by qualified faculty and staff through effective classroom instruction that is inclusive of diverse learners and their learning needs,
- Articulate a vision for student achievement, differentiated instruction, and the integration of technology to enhance learning,
- Ensure the school uses school-wide assessment practices to document student learning and program effectiveness, using valid and reliable data to inform instruction to improve student performance, to make student performance transparent, and to inform the continuous review of the curriculum and the improvement of instructional practices, and
- Ensure the school provides programs and services aligned with its mission to enrich the academic program and support the development of student and family life.

Rating (1,2, 3, or 4) = \_\_\_\_\_

Supervisor Comments/Examples:

**Domain 4: Operational Vitality-** The extent to which the principal collaborates appropriately with the governing body and leadership team of the school (i.e., pastor or president, board of directors, etc.) and/or appropriate personnel and committees to:

- (If applicable) Implement and monitor a feasible multi-year financial plan that includes both current and projected budgets and is the result of a collaborative process that emphasizes faithful stewardship and sustainability,
- Ensure the school operates with a healthy staff morale, in accord with a current employee manual and in compliance with Archdiocese of Milwaukee policies regarding teacher recruitment, salary and benefits, faculty growth and evaluation, and employee morale,
- (If applicable) Develop and maintain a budget for facilities, equipment, and a technology plan designed to continuously support the implementation of the educational mission of the school, and
- Develop and enact a comprehensive plan for institutional advancement, based on a compelling mission, through communications, marketing, enrollment management, and development.

Rating (1,2, 3, or 4) = \_\_\_\_\_

Supervisor Comments/Examples:

**Additional Comments:**

**1. Noteworthy Areas of Strong Performance.**

Comment on 2-3 job accomplishments or behaviors that are considered major strengths.

**2. Areas of Improvement.**

Comment on 2-3 job responsibilities or behaviors that require development.

**3. Final/Summary Comments:**

**A copy of the job description is attached and has been (select one):**

\_\_\_\_\_ Reviewed with the employee and there is no change.

\_\_\_\_\_ Updated and discussed with employee.

**Goals related to the four domains have been:**

\_\_\_\_\_ (Y/N) Discussed in terms of progress (previous/current year).

\_\_\_\_\_ (Y/N) Reviewed in terms of next steps (including date for Principal to submit updated goals to supervisor).

*The employee's signature indicates only that he/she has seen this evaluation and does not indicate agreement or disagreement with the evaluation.*

Principal Signature \_\_\_\_\_

Date \_\_\_\_\_

Supervisor Signature \_\_\_\_\_

Date \_\_\_\_\_