

HANDBOOK ON



Educational Specialist Evaluation



ASSESSING
and IMPROVING
PERFORMANCE

—FEATURING—

Guidance counselor

Instructional technology
specialist

Library/Media specialist

Occupational/Physical therapist

School nurse

School psychologist

School social worker

Speech pathologist

James H. Stronge
Pamela D. Tucker

An **Eye On Education** Book

Handbook on Educational Specialist Evaluation

Assessing and Improving Performance

James H. Stronge
Pamela D. Tucker

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Dedication

To my son, Tim,
with love.
James Stronge

To my father,
who taught me the fundamental importance of “good people,”
whether in a large corporation like Boeing
or in the neighborhood school down the street.
Pamela Tucker

and

To the many teachers, educational specialists,
and administrators, who have shared their stories
with us, many hopeful and some discouraging,
about the realities of personnel evaluation.

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Preface

Evaluation is not new to the field of education. For varying reasons—sometimes for improvement, sometimes for accountability, often for both—and with varying degrees of success, personnel evaluation has come to be an accepted and expected part of the educational landscape. In the current era of high standards and high-stakes testing with their high-stakes connections to personnel accountability, evaluation is more at the forefront of education than ever. School reform ultimately comes down to the professionals working with students on a daily basis. Schools and school systems can enable high quality programs and services in a number of ways, but ultimately success comes down to what the educator does with children and how.

How do we encourage the very best in educators? How do we foster professional dialogue and reflection on one's work? How do we support the new specialist who is overwhelmed with all the complexities of practice in the first few years? How do we ensure that capable individuals are working with children? Evaluation has the potential to do all of these things, if it is undertaken as a professional endeavor versus a bureaucratic one. It is an opportunity for schools to create processes for examining the most important work they do, serving the nation's children. The possibilities for how this can be done have never been greater or richer. In this *Handbook on Educational Specialist Evaluation*, we provide both a framework for designing a quality evaluation system and the tools to build it that reflects current thinking and best practices in the field.

How is the Handbook Organized?

The *Handbook* is organized into three separate major sections. Each section is carefully integrated with the others in order to provide a more useful, practical guide for educational specialist evaluation.

- ♦ **Part I** presents eight chapters that provide an in-depth exploration of educational specialist evaluation, the Goals and Roles Evaluation Model, specific standards for the evaluation of educational specialists, guidelines for using multiple data sources, ways and means for rating performance, and practical suggestions for implementation.
 - **A Conceptual Model**
The *Handbook* provides a conceptual model that integrates theoretical, professional, and field-based frameworks for the evaluation of educational specialists. Chapter 1, Educational Specialist Evaluation: Getting Started, provides an overview for educational specialist evaluation; Chapter 2, Educational Specialist Evaluation: Background and Context, offers a historical review of educational specialist evaluation, along with criteria for designing evaluation systems.
 - **A Step-by-Step Evaluation Process**
A thorough discussion of the Goals and Roles Evaluation Model is presented in Chapter 3. The Goals and Roles Evaluation Model delineates six distinct steps

in the evaluation cycle. Descriptions of the steps and examples of how to implement each step in a school setting are provided in subsequent chapters.

- **Educational Specialist Job Responsibilities**

An outline of the professional responsibilities of the educational specialist, with sample performance indicators representing behavioral manifestations of these responsibilities, is provided in Chapter 4, *Developing Performance Standards*. The responsibilities serve as a guideline for developing customized evaluation frameworks, tailored to individual settings.

- **Documenting and Analyzing Performance**

Chapter 5, *Rating Performance of Educational Specialist Performance*, provides criteria for rating educational specialist performance. Chapter 6, *Documenting Performance of Educational Specialist Performance*, delineates the many types of data sources for documenting educational specialist performance and how they can be blended for a more dynamic evaluation system. Chapter 7, *Implementing an Educational Specialist Performance Evaluation System*, pulls all the ingredients together and discusses the myriad questions about implementation of an educational specialist evaluation system. Finally, Chapter 8, *Where Do We Go From Here*, summarizes what we know about best practices in educational specialist evaluation and what are recommended future directions for the field.

- ♦ **Part II** provides eight comprehensive sets of educational specialist job responsibilities, organized around specified domains, standards, and performance indicators. The teaching positions included in the sets of educational specialist job responsibilities include:

- Guidance Counselor
- Instructional Technology Specialist
- Library Media Specialist
- Occupational/Physical Therapist
- School Nurse
- School Psychologist
- School Social Worker
- Speech/Language Therapist

- ♦ **Part III** provides “tools you can use” in designing and implementing educational specialist evaluation systems. The various tools that can be used to structure an educational specialist evaluation system are presented. These tools were adapted from materials developed over the last 15 years for use in individual school districts. A CD-ROM offers the opportunity to start customizing forms to meet a particular school or district’s needs. Among the tools included are:

- Performance Appraisal Rubric
- Annual Goal Setting Form
- Performance Record
- Observation Record
- Portfolio Feedback
- Portfolio Table of Contents

- Client Surveys
- Summative Evaluation
- Improvement Assistance Plan
- Performance Evaluation System Feedback

The *Handbook on Educational Specialist Evaluation* is the second in a series on the evaluation of four distinct educational groups: teachers, educational specialists, administrators, and classified employees. Each of the handbooks is organized in a similar manner with three major sections. Part I is intentionally similar in all four handbooks to provide a consistent framework for implementing an evaluation system while emphasizing the differences specific to each group. Parts II and III are unique to each handbook and include detailed frameworks of the job responsibilities for the respective groups of educators and various tools to use in the evaluation process. While each handbook has been written to “stand alone” for use with a specific group of educators, the series of handbooks taken together provides a more integrated and holistic approach to personnel evaluation.

It is our sincere hope that you will find the *Handbook on Educational Specialist Evaluation* to be a valuable resource as you seek to improve the programs and special services offered in your schools by supporting the educational specialists who provide them. Moreover, please consider the other handbooks in this series on the evaluation of educational personnel.

Acknowledgments

Our work in personnel evaluation has spanned twenty years and is founded on our belief that evaluation can be done in a meaningful manner for teachers and educational specialists given a conceptually sound framework, thorough training, strong commitment, and trusting collaboration between faculty and administrators. Often the development work on a new evaluation system itself can re-energize educators as they work together to improve what goes on in all areas of the school. Evaluation in its simplest form is to “judge,” “appraise,” and “assess,” and these functions are at the core of what it means to be a professional. It is important work, not because it is legally mandated in most places, but because it can be an opportunity to assess what we do, how we do it, and why. We have been fortunate to work with many fine professionals over the years who have taken this work seriously and used evaluation as a means to improve education for all who participate in the process.

We would like to extend our sincere appreciation to all of the individuals and organizations who have assisted us in the evolution of the ideas presented in this *Handbook*. In particular, we wish to acknowledge the following school districts in our home state of Virginia for their efforts to improve educator practice through performance evaluation and professional growth systems that incorporate many of the components we recommend in this book: Alexandria City Schools, Dinwiddie County Schools, Hampton City Schools, Roanoke City Schools, Virginia Beach City Public Schools, and Williamsburg-James City County Schools. We drew from their practice to highlight selected concepts and, in some instances, to offer illustrations and materials included in appendices. We are grateful to these and the many school systems from across the country that shared their evaluation procedures and instruments with us.

Just as the content of this handbook reflects the efforts of many people, so does its organization, research, and editing. We especially wish to thank Jennifer Hindman for her organizational skills, editing, graphic renderings, and research on existing evaluation systems. Catherine Little provided the fresh set of eyes to edit and integrate the disparate pieces of work that make up this *Handbook*. We appreciate the considerable time and effort they both invested in the project.

Finally, we thank the President of Eye on Education, Bob Sickles, for his remarkable business sense and unfailing support and enthusiasm for our work on the evaluation of educational personnel.

James H. Stronge
Pamela D. Tucker

What's on the CD and How to Use it!

The CD-ROM, for Windows and Macintosh, is designed to make this book more practical and easier to use.

Part II, *Roles and Responsibilities*, is on the CD-ROM in its entirety in *Adobe Acrobat®* (pdf) format. You have permission to print out the lists of job responsibilities, which are organized around specified domains, standards, and performance indicators.

The tools and forms in Part III, *Tools You Can Use*, are available as interactive files, enabling you to fill them out, customize them, and save and print them using *Microsoft Word*.

To use the interactive forms in Part III, follow these instructions:

Complete the form by typing in the blanks provided and/or by clicking on the checkboxes. Use the **Tab** key to move from field to field. When you are finished, save the file with a unique name by using the **Save As** function.

Worksheets and forms are “protected”; that is, the instructions on the form and its structure are locked and cannot be changed unless you choose to do so. If you want to make modifications to the language on the form (such as inserting the name of your school or district or otherwise customizing the language on the form) follow these directions:

1. Choose **Unprotect Document** from the **Tools** menu.
2. Type in the password, “Modify” (it must be typed exactly as shown here; it is case sensitive), and click the **OK** button. The form will unlock and become a regular Word document.
3. Save the file to your hard drive with a new name using the **Save As** function.

While a document is unprotected, form functionality is unavailable. To re-enable form functions, choose **Protect Document** from the **Tools** menu. Note that re-enabling a form will remove any data that you previously inserted into the form fields.

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About the Authors

James H. Stronge is Heritage Professor in the Educational Policy, Planning, and Leadership Area at the College of William and Mary, Williamsburg, Virginia. One of his primary research interests is in educational personnel evaluation. He has worked with numerous school districts and other educational organizations to design and implement evaluation systems for teachers, administrators, and support personnel. He is the author or coauthor of numerous articles, books, and technical reports on teacher, administrator, and support personnel evaluation. Selected authored or edited publications include the books *Qualities of Effective Teachers* (Association for Supervision and Curriculum Development), *Evaluating Professional Support Personnel in Education* (Sage Publications), *Evaluation Handbook for Professional Support Personnel* (Center for Research on Educational Accountability and Teacher Evaluation), *Evaluating Teaching: A Guide to Current Thinking and Best Practice* (Corwin Press), and *Teacher Evaluation and Student Achievement* (National Education Association). Most recently, he coauthored *Handbook on Teacher Portfolios for Evaluation and Professional Development* (Eye on Education) with Pamela Tucker and Christopher Gareis. Dr. Stronge also served as director of the Evaluating Professional Support Personnel project conducted by the Center for Research on Educational Accountability and Teacher Evaluation (CREATE). Currently he is the Associate Editor of the *Journal of Personnel Evaluation in Education*. His doctorate is in the area of educational administration and planning and was received from the University of Alabama. He has been a teacher, counselor, and district-level administrator.

Pamela D. Tucker is an assistant professor of education in the Curry School of Education at the University of Virginia, Charlottesville, Virginia. She serves as the director of the Principal Internship Program. She has worked with numerous school systems in the development of new evaluation systems and served as one of the facilitators for the development of Virginia's *Guidelines for Uniform Performance Standards and Evaluation Criteria for Teachers, Administrators, and Superintendents*. Her research focuses on the various aspects of personnel evaluation and the nature of the school principalship. Books coauthored with others include *Handbook on Teacher Portfolios for Evaluation and Professional Development* (Eye on Education), *Evaluation Handbook for Professional Support Personnel* (Center for Research on Educational Accountability and Teacher Evaluation), and *Teacher Evaluation and Student Achievement* (National Education Association). Her article publications address topics such as the legal context for teacher evaluation, helping struggling teachers, and guidelines for linking student achievement to teacher evaluation. As a former special education teacher and administrator in a school for learning disabled students, she has worked with a variety of student populations and has a particular concern for students who are most at-risk for school failure. She earned her Ed.D. in Educational Administration from the College of William and Mary.

Supplementary Resources Disclaimer

Additional resources were previously made available for this title on CD. However, as CD has become a less accessible format, all resources have been moved to a more convenient online download option.

You can find these resources available here: <https://www.routledge.com/9781138470699>

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Part I

Developing and Implementing an Educational Specialist Evaluation System



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Educational Specialist Evaluation: Getting Started

How do you evaluate the diverse professional educational staff in today's schools who are neither administrators nor teachers?¹ In a typical elementary or secondary school, 20–45% of the professional educators who walk through the schoolhouse door every day are non-teaching and non-administrative employees—educational specialists.² These professional educators—counselors, nurses, librarians/media specialists, school psychologists, and a variety of other professional positions—are vitally important to the daily operation and ultimate success of the school.³

Evaluation procedures and systems exist for the assessment of teachers and administrators, but too frequently schools and school districts have neglected the proper evaluation of educational specialists. This error or omission is in spite of the growing and invaluable role played by educational specialists who fulfill an array of duties and responsibilities that are fundamental to the support of students, teachers, and indeed, the entire educational enterprise. Exploring issues related to the evaluation of these important educators is the focus of the *Handbook on Educational Specialist Evaluation*. In this introductory chapter, we specifically address the following questions:

- ◆ Who are educational specialists?
- ◆ What is unique about evaluating educational specialists?
- ◆ What are the purposes of quality performance evaluation?
- ◆ Why has performance evaluation often failed to be effective?
- ◆ What components are essential for a quality performance evaluation system?
- ◆ What are guidelines for developing and implementing quality educator performance evaluation systems?
- ◆ What is the purpose of the *Handbook on Educational Specialist Evaluation*?
- ◆ What does the *Handbook on Educational Specialist Evaluation* not provide?

Figure 1.1
Educational
Specialist Position
Categories

Position Categories	Illustrative Positions
Pupil personnel services	<ul style="list-style-type: none"> ♦ guidance counselors ♦ school nurses ♦ school psychologists ♦ social workers
Instructional support services	<ul style="list-style-type: none"> ♦ library media specialists ♦ instructional technology specialists
Special education services	<ul style="list-style-type: none"> ♦ occupational therapists ♦ physical therapists ♦ speech and language pathologists

Who Are Educational Specialists?

The term *educational specialist* includes non-teaching, non-administrative education professionals who provide a myriad of support services to students, teachers, and parents. Thus, educational specialists include counselors, nurses, librarians/media specialists, school psychologists, and others who have specialized training and offer a broad range of services to students. The term does *not* include non-certificated, non-licensed staff such as clerical assistants or custodians. Also, it does not include auxiliary support services to the school district such as clerk-of-the-works or purchasing agents.⁴

Broad categories of educational positions that can be subsumed under the *educational specialist* umbrella are depicted in Figure 1.1. A brief description is provided here for each of these positions. Part II of the *Handbook* offers extensive position descriptions for each position; Part III provides customized forms for use in the evaluation of these positions.

Pupil Personnel Services

♦ Guidance Counselors

School counselors provide individual and group counseling to address problems that inhibit learning, assume leadership for school

testing programs, serve on multidisciplinary teams for the development of individual educational plans, and offer guidance programs on appropriate developmental issues (i.e., vocational or educational planning).

♦ School Nurses

School nurses participate in the planning, implementing, and evaluation of the school health program, serve on multidisciplinary teams for the development of individual educational plans, provide emergency care procedures, and promote a total school health program.

♦ School Psychologists

School psychologists conduct individual psychological assessments, offer interpretations and recommendations through meetings and consultations, provide individual and group therapy, provide assistance in the process of identification and diagnosis of disabilities, and serve on multidisciplinary teams for the development of individual educational plans.

♦ School Social Workers

School social workers provide services such as casework, group work, consultations, home visits, and referrals to community agencies. Often they are addressing issues associated with attendance, obtaining case histories, and performing behavioral assessments and developing intervention plans.

Instructional Support Services

◆ School Library Media Specialists

School library/media specialists provide student and staff instruction in library media skills and use of equipment, operate an effective library/media center to enrich and support the educational program, encourage the integration of media into the curriculum, and support classroom teachers in their instructional units.

◆ Instructional Technology Specialists

Instructional technology specialists assume a variety of functions in buildings. Ideally, they are a resource for teachers, helping them to learn about instructional technology and how to infuse it into the classroom. They are able to provide suggestions on what electronic resources are available and how to integrate them into the curriculum. In some situations the instructional technology specialist also supports the technology infrastructure in the school.

Special Education Services

◆ Occupational Therapists

Occupational therapists assist and support students in performing daily living and work environment tasks. They help improve basic motor functions, self-care and interpersonal skills to help students compensate for permanent loss of function. They consult with families, teachers and others to help facilitate the child's growth and development within all of the environments in which children live.

◆ Physical Therapists

Physical therapists work with students to promote overall health and fitness as they work on restoring function, improving mobility, or reducing the impact of permanent physical disabilities. They consult with families, teachers and others to promote the integration of motor function in all settings for the child

◆ Speech/Language Pathologists

Speech/language pathologists work with students who have difficulty with speech, language, communication, voice, fluency, and other related problems. They assess, diagnose, and treat students' speech and language difficulties. They consult with families, teachers, and others to enhance communication skills.

What Is Unique About Evaluating Educational Specialists?

There are four basic factors that at least partially explain why evaluating educational specialists is unique:

- ◆ multiple supervisors across settings;
- ◆ the absence of well-developed job descriptions;
- ◆ the inclusion of multiple specialty positions reflecting highly specialized practices and training; and
- ◆ the particular need for using multiple data sources in the evaluation of special education personnel.

Multiple Supervisors

American education has a long history of supervision based on the classical administrative principle of unity of command or a single supervisor. Adopted from the work of Henri Fayol and others, the operation of unitary command structures in schools has meant that every employee has had one immediate supervisor, and formal communications and evaluations within the organization occurred within the linear chain of command (e.g., superintendent to principal to teacher). This principle is codified in virtually all contemporary schools in the form of the organization chart, resulting in a simplified, albeit bureaucratic, decision structure.