

Rudolph F. Crew, Ed.D., Superintendent of Schools

SUBJECT: REQUEST THAT THE SCHOOL BOARD OF MIAMI-DADE COUNTY, FLORIDA, AUTHORIZE THE SUPERINTENDENT TO PILOT THE PROPOSED MANAGERIAL EXEMPT PERSONNEL (MEP) PERFORMANCE MANAGEMENT SYSTEM FOR THE 2006-07 SCHOOL YEAR

COMMITTEE: SCHOOL SUPPORT ACCOUNTABILITY

BACKGROUND

At the November 16, 2005 School Board meeting, the School Board authorized the Superintendent to conduct the MEP Incentive Pay Pilot Study. The MEP Incentive Pilot was the first step in aligning objective employee job performance targets to the District's Strategic Plan and School Improvement Plans (SIP) and the first step in rewarding employees for high performance. Since that time, staff has revamped the current MEP evaluation system to include these objective performance targets for each employee and to improve the evaluation system's usefulness in providing consistent, practical, and timely feedback. In designing the new MEP evaluation system, staff has incorporated feedback obtained from focus groups held with both school site and non-school site MEP employees and from a survey given to all MEP employees (of which over 800 employees responded). The following is the proposed MEP evaluation system, referred to as the "MEP Performance Management System."

OVERVIEW

The proposed MEP Performance Management System will have three components – a Scorecard, a section on Administrative Competencies, and a section on Professional Growth Targets. The scorecard establishes targets on objective measures that are derived directly from the District Strategic Plan and/or SIP. The scorecard incorporates the "lessons learned" from the MEP Incentive Pay Pilot Study (those "lessons learned" will be presented to the Board at the August 2006 School Board meeting). The Administrative Competencies are defined leadership and technical skills required to achieve the performance targets outlined in the scorecard. The Professional Growth Targets are experiences and activities that contribute to the growth and enhancement of the Administrative Competencies needed to meet performance targets.

Each component will be weighted differently – Scorecard at 60%, Administrative Competencies at 30%, and Professional Growth Targets at 10%. These weights will be combined to determine an overall assessment of an employee's performance. The overall assessment will align to the following new performance levels:

- "Substantially Exceeds Standards" - extraordinary performance
- "Exceeds Standards" - excellent performance
- "Meets Standards" - acceptable performance
- "Does Not Meet Standards" - performance that does not meet targets. This rating would require written intervention strategies for the employee to improve performance

An employee would have to earn an overall assessment of Substantially Exceeds Standards or Exceeds Standards in order to be eligible for incentive pay. School site and Regional MEP employees earning an overall assessment of Substantially Exceeds Standards or Exceeds Standards would receive a one-time bonus of 7% or 5% of his/her salary, respectively. Non-School site MEP employees earning an overall assessment of Substantially Exceeds Standards or Exceeds Standards would receive a one-time salary bonus of 4.2% or 3% of his/her salary, respectively.

The proposed MEP Performance Management System process is similar to the current process and is as follows:

- **Establish Performance Targets** – By September 30, assessee and assessor will agree on performance targets and professional growth activities. This will be based on the District Strategic Plan/SIP and personalized areas for growth
- **Mid-Year Performance Review** – During December and January, assessee and assessor will review and discuss all performance data available and agree on what, if any, changes in professional growth activities or support are necessary to ensure continued growth and high performance. If needed, intervention strategies to address areas of low performance will be established and agreed upon
- **End-of-Year Performance Evaluation** – By June 30, assessee and assessor will review and discuss all three components of the evaluation. The assessee's overall assessment and incentive pay (based on that assessment) will be determined and discussed. This discussion will include areas of high achievement and areas where more support and growth are needed. Incentive pay will be distributed at the end of August for qualified MEP employees

PILOT

While all MEP employees will have a scorecard and be eligible for incentive pay for the 2006-07 fiscal year, a subset of MEP employees will pilot the proposed MEP Performance Management System. The Pilot process allows for time to test the effectiveness of the proposed instrument and to incorporate feedback prior to full implementation.

School site pilot participants will be determined through a volunteer process – principals will discuss potential participation with their vice principals/assistant principals and will volunteer the entire school administration team, if deemed desirable. Other pilot participants will be the employees that participated in the MEP Incentive Pay Pilot Study and their direct reports. This group includes 12 members of the Superintendent's Cabinet, 12 Cabinet member's direct reports, six Regional Superintendents, 24 Regional Directors, and 24 Regional Instructional Supervisors. These pilot participants will use the proposed MEP Performance Management System for the 2006-07 fiscal year. Incentive Pay will be awarded for earning an overall assessment of Substantially Exceeds Standards or Exceeds Standards. All other MEP employees will use the current evaluation system and an individualized scorecard. Incentive Pay for this group of MEP employees will be based solely on the results of the scorecard.

During the summer of 2007, feedback gathered from the above-mentioned pilot will be incorporated into the MEP Performance Management System for complete rollout in 2007-08.

There is no additional cost of piloting the complete MEP Performance Management System. It is currently estimated that the cost for pay-out of incentive payments for the 2006-07 school year for all MEP employees will be approximately \$1.4 million. An agenda item will be presented to the Board at the August 2006 School Board meeting to request authorization for full implementation of the MEP incentive pay. This cost assumes that all MEP employees have a scorecard and are eligible for incentive pay.

Copies of the MEP Performance Management System powerpoint presentation and the MEP Evaluation form will be transmitted under separate cover and are available for inspection in the Office of Board Recording Secretary, Room 924, and the Citizen Information Center, Room 158, 1450 NE Second Avenue, Miami, Florida 33132.

RECOMMENDED: That The School Board of Miami-Dade County, Florida, authorize the Superintendent to pilot the proposed MEP Performance Management System for the 2006-07 school year.

There is no additional cost of piloting the MEP Performance Management System.