

# **MONTANA EDUCATOR PERFORMANCE APPRAISAL SYSTEM (MONTANA-EPAS)**

**A State Model for Principal Evaluation**

**August 2013**

**Revised November 2015**

**Revised August 2022**

**Revised November 2023**

## Introduction Table of Contents

Introduction .....	3
Purpose .....	5
Professional Standards for Educational Leaders (PSEL).....	6
PSEL One: Mission, Vision, and Core Values.....	6
PSEL Two: Ethics and Professional Norms .....	7
PSEL Three: Equity and Cultural Responsiveness .....	7
PSEL Four: Curriculum, Instruction, and Assessment .....	8
PSEL Five: Community of Care and Support for Students .....	8
PSEL Six: Professional Capacity of School Personnel .....	9
PSEL Seven: Professional Community for Teachers and Staff .....	10
PSEL Eight: Meaningful Engagement of Families and Community .....	11
PSEL Nine: Operations and Management.....	12
PSEL Ten: School Improvement .....	13
Framework for Principal Evaluation.....	14
Domain One: Vision and Goals .....	16
Domain Two: Culture of Learning.....	17
Domain Three: Management.....	19
Domain Four: Professional Responsibilities.....	21
Montana Educator Performance Appraisal System Cycle .....	23
Appraisal Cycle Elements for Principal Evaluation.....	24
Process-at-a-Glance .....	25
Step-by-Step Principal Evaluation Process.....	26
District/School Strategic Plan and Goal Setting.....	26
Principal Professional Responsibilities and Goal(s) .....	26
Formative Feedback.....	27
Summative Evaluation .....	28
Improvement Plans.....	30
Principal Evaluation Rubrics and Indicators.....	31
Principal Evaluation Forms.....	36
Principal Professional Responsibilities and Goal(s) Form .....	37
Principal Formative Feedback Form .....	41
Principal Summative Evaluation Form .....	43
Principal Improvement Plan Form .....	49

## Introduction

### Montana Educator Performance Appraisal System (Montana-EPAS) A State Model for Evaluation

*High-quality, high-performing teachers and school leaders are critical to ensure student learning. An evaluation system based on professional growth for all educators will help to foster learning environments that meet the needs of all students. (Evaluation Systems Work Group, May 7, 2013)*

#### Introduction

The Montana-EPAS consists of models for the evaluation of teachers and school and district leaders. This standards-based evaluation system is designed to encourage professional learning through a continuum of career development. The Montana- EPAS provides usable tools for school districts to implement the state model or use a common framework to align local systems of evaluation to the state standards. Improving professional practice of educators will help to assure student success.

The Montana-EPAS was developed by a subgroup, Evaluation Systems Work Group, formed to meet the requirements of the Board of Public Education (BPE). Below is the BPE standard relating to evaluation.

ARM [10.55.724](#) Board of Trustees ...

*(1) The local board of trustees shall ensure the completion of periodic written evaluations of all regularly employed instructional personnel who are under written contract. Employees evaluated shall have access to a copy of the evaluation instrument, the opportunity to respond in writing to the completed evaluation, and access to the employee's files.*

*(2) The Superintendent of Public Instruction shall develop and publish model evaluation instruments that comply with this rule in collaboration with the Montana Federation of Public Employees, the Montana Rural Education Association, the Montana School Boards Association, the School Administrators of Montana, and the Montana Small School Alliance. A school district adopting and using one of the model instruments shall be construed to have complied with this rule, though use of one of the models shall not be required provided that the district's evaluation instrument and process substantially conform to the requirements set forth in this rule.*

The Montana-EPAS relating to school and district leaders is based on the 2015 Professional Standards for Educational Leaders (PSEL) formerly known as the Interstate School Leaders Licensure Consortium (ISLLC) Standards (2008). The focus of the PSEL is to articulate what effective leadership should look like in today's and tomorrow's accredited school systems. *The standards envision public schools that empower every learner to take ownership of their learning, that emphasize the learning of content and application of knowledge and skill to real world problems, that value the differences each learner brings to the learning experience, and that leverage rapidly changing learning environments to maximize learning (CCSSO, 2014).* These standards support the primary purpose of the Montana-EPAS: to promote ongoing professional growth to ensure effective instructional practice that leads to learning, well-being, and success for every Montana student.

## Introduction

### Montana-EPAS Implementation

Districts may implement the Montana-EPAS for the evaluation of principals by adopting, adapting, and modifying one of the state model examples, or districts may align the local evaluation system to state standards. Both implementation options fulfill the BPE standard ARM 10.55.724.

## Purpose

### Montana Educator Performance Appraisal System (Montana-EPAS) Principal Evaluation

The primary purpose of the model Montana system for evaluation of teachers and school and district leaders is to foster continuous professional growth enabling learning, well-being, and success for all students. The model state evaluation system is based on three core concepts: professional growth, continuous improvement, and quality assurance.

**Professional growth** focuses on enhancing the skills and knowledge of educators in the following areas:

- Leadership/professionalism
- Student learning
- School climate
- School finance and law
- School management including collective bargaining
- Community/constituent relations
- Trustees/school leader relations
- Achievement of school goals and/or indicators of success

**Continuous improvement** focuses on the educator's commitment to continuously improving practice so that principal, teacher, and student performance is continuously enhanced.

**Quality assurance** focuses on the collection of credible evidence about educator performance. Evaluators use the evidence to make important decisions about

- Data that measure progress of the school
- Achievement of agreed upon goals
- Perspectives and judgment of the principal
- Perspectives and judgment of the superintendent

## Professional Standards for Educational Leaders

*The Professional Standards for Educational Leaders (PSEL) are founded on a research- and practice-based understanding of the relationship between educational leadership and student success. These Standards provide a holistic view of leadership promoting learning, achievement, development, and well-being of each student (PSEL, 2015).*

The PSEL exemplify the knowledge, skills, and dispositions necessary for the development of effective educational leaders. A continuum of professional growth throughout an educational leader's career recognizes that one gains skill and expertise over time. School principals often focus time and energy on specific standards and performances that directly relate to their administrative role. These standards guide the Montana-EPAS process guide and model examples for administrator evaluation and performance indicators.

*The Professional Standards for Educational Leaders are organized around the domains, qualities, and values of leadership work that research and practice indicate contribute to students' academic success and well-being. Each Standard features a title and a statement that succinctly defines the work of effective educational leaders in that particular realm. A series of elements follow, which elaborate the work that is necessary to meet the Standard. The number of elements for each Standard varies in order to describe salient dimensions of the work involved. It does not imply relative importance of a particular Standard (PSEL, 2015).*

### PSEL Standard One: Mission, Vision, and Core Values

Effective educational leaders develop, advocate, and enact a shared mission, vision, and core values of high-quality education and the academic success and well-being of each student.

#### Effective Leaders

- Develop an educational mission for the school to promote the academic success and well-being of each student.
- In collaboration with members of the school and the community and using relevant data, develop and promote a vision for the school on the successful learning and development of each child and on instructional and organizational practices that promote such success.
- Articulate, advocate, and cultivate core values that define the school's culture and stress the imperative of child-centered education; high expectations and student support; equity, inclusiveness, and social justice; openness, caring, and trust; and continuous improvement.
- Strategically develop, implement, and evaluate actions to achieve the vision for the school.
- Review the school's mission and vision and adjust them to changing expectations and opportunities for the school and changing needs and situations of students.
- Develop shared understanding of and commitment to mission, vision, and core values within the school and the community.
- Model and pursue the school's mission, vision, and core values in all aspects of leadership.

## Professional Standards for Educational Leaders

### PSEL Standard Two: Ethics and Professional Norms

Effective educational leaders act ethically and according to professional norms to promote each student's academic success and well-being.

#### Effective leaders:

- Act ethically and professionally in personal conduct, relationships with others, decision-making, stewardship of the school's resources, and all aspects of school leadership.
- Act according to and promote the professional norms of integrity, fairness, transparency, trust, collaboration, perseverance, learning, and continuous improvement.
- Place children at the center of education and accept responsibility for each student's academic success and well-being.
- Safeguard and promote the values of democracy, individual freedom and responsibility, equity, social justice, community, and diversity.
- Lead with interpersonal and communication skills, social-emotional insight, and understanding of all students' and staff members' backgrounds and cultures.
- Provide moral direction for the school and promote ethical and professional behavior among faculty and staff.

### PSEL Standard Three: Equity and Cultural Responsiveness

Effective educational leaders strive for equity of educational opportunity and culturally responsive practices to promote each student's academic success and well-being.

#### Effective Leaders:

- Ensure that each student is treated fairly, respectfully, and with an understanding of each student's culture and context.
- Recognize, respect, and employ each student's strengths, diversity, culture as assets for teaching and learning.
- Ensure that each student has equitable access to effective teachers, learning opportunities, academic and social support, and other resources necessary for success.
- Develop student policies and address student misconduct in a positive, fair, and unbiased manner.
- Confront and alter institutional biases of student marginalization, deficit-based schooling, and low expectations associated with race, class, culture and language, gender and sexual orientation, and disability or special status.
- Promote the preparation of students to live productively in and contribute to the diverse cultural contexts of a global society.
- Act with cultural competence and responsiveness in their interactions, decision making, and practice.
- Address matters of equity and cultural responsiveness in all aspects of leadership.

## Professional Standards for Educational Leaders

### PSEL Standard Four: Curriculum, Instruction, and Assessment

Effective educational leaders develop and support intellectually rigorous and coherent systems of curriculum, instruction, and assessment to promote each student’s academic success and well-being.

#### Effective Leaders

- Implement coherent systems of curriculum, instruction, and assessment that promote the mission, vision, and core values of the school, embody high expectations for student learning, align with academic standards, and are culturally responsive.
- Align and focus systems of curriculum, instruction, and assessment within and across grade levels to promote student academic success, love of learning, the identities and habits of learners, and healthy sense of self.
- Promote instructional practice that is consistent with knowledge of child learning and development, effective pedagogy, and the needs of each student.
- Ensure instructional practice that is intellectually challenging, authentic to student experiences, recognizes student strengths, and is differentiated and personalized.
- Promote the effective use of technology in the service of teaching and learning.
- Employ valid assessments that are consistent with knowledge of child learning and development and technical standards of measurement.
- Use assessment data appropriately and within technical limitations to monitor student progress and improve instruction.

### PSEL Standard Five: Community of Care and Support for Students

Effective educational leaders cultivate an inclusive, caring, and supportive school community that promotes the academic success and well-being of each student.

#### Effective Leaders

- Build and maintain a safe, caring, and healthy school environment that meets the academic, social, emotional, and physical needs of each student.
- Create and sustain a school environment in which each student is known, accepted and valued, trusted and respected, cared for, and encouraged to be an active and responsible member of the school community.
- Provide coherent systems of academic and social supports, services, extracurricular activities, and accommodations to meet the range of learning needs of each student.
- Promote adult-student, student-peer, and school-community relationships that value and support academic learning and positive social and emotional development.
- Cultivate and reinforce student engagement in school and positive student conduct.
- Infuse the school’s learning environment with the cultures and languages of the school’s community.



## Professional Standards for Educational Leaders

### PSEL Standard Six: Professional Capacity of School Personnel

Effective educational leaders develop the professional capacity and practice of school personnel to promote each student's academic success and well-being.

#### Effective Leaders

- Recruit, hire, support, develop, and retain effective and caring teachers and other professional staff and form them into an educationally effective faculty.
- Plan for and manage staff turnover and succession, providing opportunities for effective induction and mentoring of new personnel.
- Develop teachers' and staff members' professional knowledge, skills, and practice through differentiated opportunities for learning and growth, guided by understanding of professional and adult learning and development.
- Foster continuous improvement of individual and collective instructional capacity to achieve outcomes envisioned for each student.
- Deliver actionable feedback about instruction and other professional practice through valid, research-anchored systems of supervision and evaluation to support the development of teachers' and staff members' knowledge, skills, and practice.
- Empower and motivate teachers and staff to the highest levels of professional practice and to continuous learning and improvement.
- Develop the capacity, opportunities, and support for teacher leadership and leadership from other members of the school community.
- Promote the personal and professional health, well-being, and work-life balance of faculty and staff.
- Tend to their own learning and effectiveness through reflection, study, and improvement, maintaining a healthy work-life balance.

## Professional Standards for Educational Leaders

### PSEL Standard Seven: Professional Community for Teachers and Staff

Effective educational leaders foster a professional community of teachers and other professional staff to promote each student's academic success and well-being.

#### Effective Leaders

- Develop workplace conditions for teachers and other professional staff that promote effective professional development, practice, and student learning.
- Empower and entrust teachers and staff with collective responsibility for meeting the academic, social, emotional, and physical needs of each student, pursuant to the mission, vision, and core values of the school.
- Establish and sustain a professional culture of engagement and commitment to shared vision, goals, and objectives pertaining to the education of the whole child: high expectations for professional work; ethical and equitable practice; trust and open communication; collaboration, collective efficacy, and continuous individual and organizational learning improvement.
- Promote mutual accountability among teachers and other professional staff for each student's success and the effectiveness of the school as a whole.
- Develop and support open, productive, caring, and trusting working relationships among leaders, faculty, and staff to promote professional capacity and the improvement of practice.
- Design and implement job-embedded and other opportunities for professional learning collaboratively with faculty and staff.
- Provide opportunities for collaborative examination of practice, collegial feedback, and collective learning.
- Encourage faculty-initiated improvement of programs and practices.

## Professional Standards for Educational Leaders

### PSEL Standard Eight: Meaningful Engagement of Families and Community

Effective educational leaders engage families and the community in meaningful, reciprocal, and mutually beneficial ways to promote each student's academic success and well-being.

#### Effective Leaders

- Are approachable, accessible, and welcoming to families and members of the community.
- Create and sustain positive, collaborative, and productive relationships with families and the community for the benefit of students.
- Engage in regular and open two-way communication with families and the community about the school, students, needs, problems, and accomplishments.
- Maintain a presence in the community to understand its strengths and needs, develop productive relationships, and engage its resources for the school.
- Create means for the school community to partner with families to support student learning in and out of school.
- Understand, value, and employ the community's cultural, social, intellectual, and political resources to promote student learning and school improvement.
- Develop and provide the school as a resource for families and the community.
- Advocate for the school and district, and for the importance of education and student needs and priorities to families and the community.
- Advocate publicly for the needs and priorities of students, families, and the community.
- Build and sustain productive partnerships with public and private sectors to promote school improvement and student learning.

## Professional Standards for Educational Leaders

### PSEL Standard Nine: Operations and Management

Effective educational leaders manage school operations and resources to promote each student's academic success and well-being.

#### Effective Leaders

- Institute, manage, and monitor operations and administrative systems that promote the mission and vision of the school.
- Strategically manage staff resources, assigning and scheduling teachers and staff to roles and responsibilities that optimize their professional capacity to address each student's learning needs.
- Seek, acquire, and manage fiscal, physical, and other resources to support curriculum, instruction, and assessment; student learning community; professional capacity and community; and family and community engagement.
- Are responsible, ethical, and accountable stewards of the school's monetary and non-monetary resources, engaging in effective budgeting and accounting practices.
- Protect teachers' and other staff members' work and learning from disruption.
- Employ technology to improve the quality and efficiency of operations and management.
- Develop and maintain data and communication systems to deliver actionable information for classroom and school improvement.
- Know, comply with, and help the school community understand local, state, and federal laws, rights, policies, and regulations so as to promote student success.
- Develop and manage relationships with feeder and connecting schools for enrollment management and curricular and instructional articulation.
- Develop and manage productive relationships with the central office and school board.
- Develop and administer systems for fair and equitable management of conflict among students, faculty and staff, leaders, families, and community.
- Manage governance processes and internal and external politics toward achieving the school's mission and vision.

## Professional Standards for Educational Leaders

### PSEL Standard Ten: School Improvement

Effective educational leaders act as agents of continuous improvement to promote each student's academic success and well-being.

#### Effective Leaders

- Seek to make school more effective for each student, teachers and staff, families, and the community.
- Use methods of continuous improvement to achieve the vision, fulfill the mission, and promote the core values of the school.
- Prepare the school and the community for improvement, promoting readiness, and imperative for improvement, instilling mutual commitment and accountability, and developing the knowledge, skills, and motivation to succeed in improvement.
- Engage others in an ongoing process of evidence-based inquiry, learning, strategic goal setting, planning, implementation, and evaluation for continuous school and classroom improvements.
- Employ situationally-appropriate strategies for improvement, including transformational and incremental, adaptive approaches and attention to different phases of implementation.
- Assess and develop the capacity of staff to assess the value and applicability of emerging educational trends and the findings of research for the school and its improvement.
- Develop technically appropriate systems of data collection, management, analysis, and use, connecting as needed to the district office and external partners for support in planning, implementation, monitoring, feedback, and evaluation.
- Adopt a systems perspective and promote coherence among improvement efforts and all aspects of school organization, programs, and services.
- Manage uncertainty, risk, competing initiatives, and politics of change with courage and perseverance, providing support and encouragement, and openly communicating the need for, process for, and outcomes of improvement efforts.
- Develop and promote leadership among teachers and staff for inquiry, experimentation and innovation, and initiating and implementing improvement.

## Framework for Principal Evaluation

### Alignment to PSEL

The model Montana system for the evaluation of principals is aligned with the PSEL as seen below.

4 Framework Domains	PSEL 2015
1. Vision and Goals	1. Mission, Vision, and Core Values 10. School Improvement
2. Culture of Learning	4. Curriculum, Instruction, and Assessment 5. Community of Care and Support for Students* 6. Professional Capacity of School Personnel*
3. Management	5. Community of Care and Support for Students* 6. Professional Capacity of School Personnel* 7. Professional Community for Teachers and Staff 9. Operations and Management
4. Professional Responsibilities	2. Ethics and Professional Norms 3. Equity and Cultural Responsiveness 8. Meaningful Engagement of Families and Community

*\*Note: Individual PSEL standards designated with an asterisk (\*) correlate to multiple Domains*

**NOTE**

The following pages explain the evaluation standards and their connection with the Professional Standards for Educational Leaders. Each domain is described, and a plan to bring all the domains into a coherent, manageable system is provided. Interlinking the four domains is both intentional and necessary.

## Domain One: Vision and Goals

### PSEL Standards One and Ten

#### Overview

Domain One: *Vision and Goals* of principal evaluation is linked to PSEL One: *Mission, Vision, and Core Values* and PSEL Ten: *School Improvement*. Domain One focuses on the principal's role and involvement in establishing, implementing, promoting, and communicating the vision and goals of the school and/or district. Domain One aligns with the school and/or district strategic plan and goals. The goals and strategies contained within the district and/or school strategic plan also align to a principal's individual goals. School and/or district strategic plans are to outline the strategies, timelines, and assessment standards. Principal initiatives are clearly aligned to the school and/or district strategic plan and are part of his or her work for the year. Working with an existing document that is reviewed and revised annually facilitates the focus of the evaluation process on continuous improvement.

**Components: The following criteria are used to evaluate the performance of the principal.**

#### 1. Vision and Goals

##### a. Assessing Data

Principal, in collaboration with others, such as the school or district improvement team or board, uses multiple sources of information and assists in analyzing data to establish rigorous and concrete school and/or district improvement goals in the context of student achievement and instructional programs.

##### b. Implementing Vision and Goals

Principal provides leadership for major initiatives and change efforts relative to the school and/or district improvement goals. Principal is committed to doing the work required for continuous school and/or district improvement.

##### c. Promoting Vision and Goals

Principal promotes high expectations for teaching and learning. Principal is committed to ensuring that all students have the knowledge and skills necessary to become successful in future educational activities.

##### d. Communicating the Vision and Goals

Principal communicates effectively to appropriate stakeholders about progress toward meeting the school and/or district improvement plan goals. Principal participates in a process to regularly monitor, evaluate and revise school and/or district improvement goals.

#### Assessment

Domain One is assessed through:

- A review of the evidence provided by the principal.
- Conferences between the evaluator and the principal.

#### Possible Sources of Evidence

- Emails and memos to staff
- Parent newsletters
- Meeting agendas
- Descriptions of procedures and processes



## Domain Two: Culture of Learning

### PSEL Standards Four, Five, and Six

#### Overview

Domain Two: *Culture of Learning*, aligns with PSEL Standard Four: *Curriculum, Instruction, and Assessment*, Standard Five: *Community of Care and Support for Students*, and Standard 6: *Professional Capacity of School Personnel*. This domain focuses on the principal's influence in advocating, nurturing, and sustaining a school and/or district culture and instructional programs conducive to student learning and staff professional growth.

**Components: The following criteria are used to evaluate the performance of the principal.**

#### 2. Culture of Learning

##### a. Advocating a Culture of Learning

Principal provides leadership for assessing, developing, and improving the school and/or district culture and instructional program that is conducive to student learning. Principal articulates the desired school and/or district instructional program and shows evidence about how he or she reinforces the instructional program and culture.

##### b. Monitoring the Culture of Learning

Principal participates in monitoring and evaluating the effectiveness of the curriculum, instruction, or assessment of students. Principal evaluates staff and provides ongoing coaching for improvement. Principal uses a variety of sources of information to make decisions.

##### c. Sustaining the Culture of Learning

Principal helps to ensure that staff has professional growth opportunities that enhance staff's performance and improve student learning. Principal is accessible and approachable by staff, families, and community and is visible in the school and/or district community. Principal supports the use of technology as appropriate in teaching and learning.

##### d. Maintaining the Culture of Learning

Principal systematically and fairly recognizes accomplishments of staff and students toward a positive school and/or district culture. Principal uses and analyzes data to instill the importance of continually developing programs and strategies to enhance opportunities for learning.

#### Assessment

Domain Two is assessed through:

- A review of the evidence provided by the principal.
- Conferences between the evaluator and the principal.
- Implementing the district educator evaluation system in accordance with its intent.

## Domain Two: Culture of Learning

### Possible Sources of Evidence

- Faculty Handbook
- Student Handbook
- Professional growth schedule
- Meeting agendas
- Emails and memos to staff
- Parent newsletters
- Calendars

## Domain Three: Management

### PSEL Standards Five, Six, Seven, and Nine

#### Overview

Domain Three: *Management*, focuses on PSEL Standard Five: *Community of Care and Support of Students*, Standard Six: *Professional Capacity of School Personnel*, Standard Seven: *Professional Community for Teachers and Staff*, and Standard Nine: *Operations and Management*. Due to an increasing focus on instructional leadership and continuous improvement, principals are transitioning from their traditional role of educational manager to instructional leader. It is essential that the school and/or district is managed as a safe, efficient, and effective learning environment. The focus for this section is management of the school and/or district to support student learning and building a culture that encourages and supports student learning. Focusing on maintaining current and previous improvements is also part of Domain Three.

**Components: The following criteria are used to evaluate the performance of the principal.**

#### 3. Management

##### a. Solving Problems or Concerns

Principal addresses and resolves issues as they arise, in a timely manner, and works to prevent potential problems. Operational procedures are designed and managed to maximize opportunities for learning for all students.

##### b. Managing Resources

Principal manages fiscal and physical resources responsibly, efficiently, and effectively. Principal protects instructional time by managing operational procedures to maximize learning. Principal efficiently manages his or her time so that teaching and learning are a high priority.

##### c. Complying with Policies and Procedures

Principal complies with federal and state law and district policies. School and/or district contractual agreements are effectively managed. Principal maintains confidentiality and privacy of school and/or district records, including student or staff information.

##### d. Protecting the Welfare and Safety of Students and Staff

Principal works to ensure a safe and secure school and/or district environment and a culture that is conducive to teaching and learning. Challenges that could potentially interrupt teaching and learning are addressed and resolved.

#### Assessment

Domain Three is assessed through a review of evidence provided by the principal. This is obtained through conferences between the evaluator and the principal.

## Domain Three: Management

### Areas assessed in this section include:

- School and/or district safety and security plans and the implementation of plans
- Scheduling of students to ensure equitable access for all students to challenging courses
- Supervision of students to ensure a safe, orderly environment
- Fidelity of implementation of curriculum and instructional programs
- Supervision and evaluation of teachers and other staff to ensure that the curriculum and instructional strategies are appropriate for all students
- Procedures and policies that support student achievement
- Allocation of funding and other resources that support student achievement and equity
- Effectiveness and efficiency of programs under the principal's responsibilities and leadership according to, but not limited to, job descriptions

### Possible Sources of Evidence

- School and/or district safety plans
- School schedules
- School and/or district budget
- Discipline procedures
- Faculty meeting agendas
- Agendas of curriculum review meetings
- School and/or district policies and procedures

## Domain Four: Professional Responsibilities

### PSEL Standards Two, Three, and Eight

#### Overview

Domain Four, *Professional Responsibilities*, is aligned with PSEL Standard Two: *Ethics and Professional Norms*, Standard Three: *Equity and Cultural Responsiveness*, and Standard Eight: *Meaningful Engagement of Families and Community*. Domain Four focuses on the principal's interaction with staff and the community. It is also concerned with the principal's fairness and consistency in dealing with students and staff. A commitment to continuous professional growth is also a focus of Domain Four.

**Components: The following criteria are used to evaluate the performance of the principal.**

#### 4. Professional Responsibilities

##### a. Maintaining Professional Relationships

Principal fosters and maintains positive professional relationships with staff. Principal is respectful of others' opinions and demonstrates an appreciation for and sensitivity to diversity in the school and/or district community.

##### b. Promoting Family and Community Involvement

Principal collaboratively works to establish a culture that encourages and welcomes families and community members and seeks ways in which to engage them in student learning.

##### c. Demonstrating Fairness

Principal is fair and consistent when dealing with students and staff. Principal demonstrates values, beliefs, and attitudes that inspire all students and staff to higher levels of performance.

##### d. Growing and Developing Professionally

Principal chooses and participates in professional growth that is aligned with his or her professional needs or aligned with the needs of the school and/or district.

#### Assessment

The evidence for the appraisal of Domain Four is derived from the Professional Responsibilities and Goal(s) Form completed by the principal at the beginning of the school year, and before the Summative Evaluation Conference each year.

## Domain Four: Professional Responsibilities

### Professional Responsibilities Reporting Key Areas

- Maintenance of professional relationships with staff and demonstration of sensitivity to diversity with the school and community.
- Working collaboratively with staff, faculty, families and community, and encouraging family and community involvement.
- Dealing fairly and consistently with the school community.
- Engagement in goal-aligned professional growth activities.

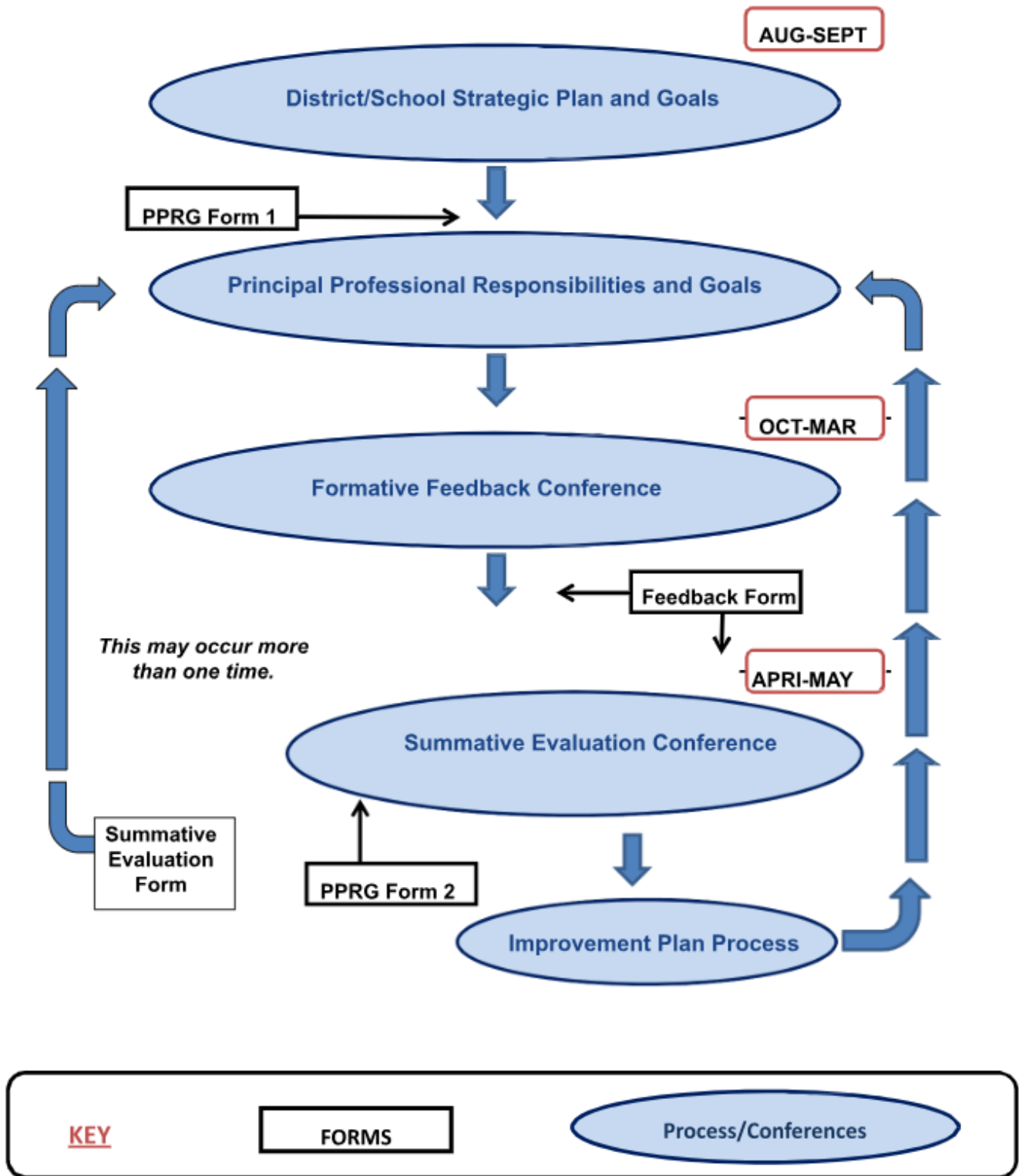
### Possible Sources of Evidence

The Professional Responsibilities and Goal(s) Form is the primary source of evidence for Domain Four.

- Parent newsletters
- Descriptions of parent engagement programs
- Agendas or other evidence from Parent Information Events
- Professional learning certificates of participation and/or grade transcripts
- Individual professional growth plans

# Montana Educator Performance Appraisal System Cycle

## (Montana EPAS – Principal Cycle)



# Montana Educator Performance Appraisal System Cycle

## Appraisal Cycle Elements for Principal Evaluation

Montana-EPAS for Principals is a continuous improvement model. The cycle is ongoing throughout the employment of the principal.

### Domains

1. Vision and Goals
2. Culture of Learning
3. Management
4. Professional Responsibility

### Processes and Conferences

Professional Responsibilities and Goal(s) Conference

Formative Feedback Conference

Summative Evaluation Conference

#### Frequency of Conferences

Principal conferences will typically occur at least three times over the one-year evaluation cycle.

- Summer: agreement on professional responsibilities and goal(s) that are placed on the Professional Responsibilities and Goal(s) Form by the principal.
- Mid-year: progress discussions followed by completion of a Formative Feedback Form.
- Spring: summative conference, followed by completion of the Summative Evaluation Form.

### Forms

Professional Responsibility and Goal(s) Form – Principal

Formative Feedback Form – Evaluator

Summative Evaluation Form – Evaluator

Improvement Plan – Principal and Evaluator



## Process-at-a-Glance

### Principal Appraisal Cycle

1. District/School Strategic Plan and Goal Setting
2. Principal Professional Responsibilities and Goals
  - a. Professional Responsibilities and Goal(s) Form (Section 1)
  - b. Professional Responsibilities and Goal(s) Conference
  - c. Professional Responsibilities and Goal(s) Form (Section 2)
3. Formative Evaluation
  - a. Formative Conference
  - b. Formative Feedback Form
4. Summative Evaluation
  - a. Summative Conference
  - b. Summative Evaluation Form
5. Improvement Plan

## Step-by-Step Principal Evaluation Process

### District/School Strategic Plan and Goal Setting

#### District/School-Wide Goal Setting

At the beginning of the new school year, the superintendent/principal reviews the district and/or school strategic plan with staff. The administrators and teachers examine district/school-wide data and other information relevant to the goals of the district and /or school strategic plan. Teachers have access to district and/or school data as well as current student data from the prior spring's state assessment.

### Principal Professional Responsibilities and Goal(s)

#### Purpose

Setting goals for student and self-improvement is an important part of every educator's work. Clear measurable goals provide a road map for staff, teachers and students.

#### Process

##### Professional Responsibilities and Goal(s) Form (Section 1)

Principal completes individual Professional Responsibilities and Goal(s) Form, Section 1 and submits to evaluator prior to the Professional Responsibilities and Goal(s) Conference.

It is recommended that new principals complete the Professional Responsibilities and Goal(s) Form within one month of employment.

##### Professional Responsibilities and Goal(s) Conference

Evaluator meets with the principal to initiate the discussion about professional responsibilities and goal(s).

##### Professional Responsibilities and Goal(s) Form (Section 2)

Principal compiles evidence of performance for all domains throughout the school year. Evidence represents the principal's ongoing work throughout the year.

Principal documents progress on professional responsibilities and individual goals and completes Section 2 of the Professional Responsibilities and Goal(s) Form, which is provided to the evaluator prior to the Summative Evaluation Conference.

## Step-by-Step Principal Evaluation Process

### Formative Feedback

Formative feedback consists of the Formative Conference and completion of the Formative Feedback Form. All four Montana-EPAS domains are addressed.

#### Formative Conference

The Formative Conference is held mid-year to discuss progress toward goals, review the Professional Responsibilities and Goal(s) Form, and other issues of interest or concern.

#### Formative Feedback Form

The Formative Feedback Form is used to record the content of conferences held and to note goals or performance expectations agreed upon. Other pertinent information that either party wishes to add is recorded and included on the Formative Feedback Form.

Following the conference, the evaluator completes a Formative Feedback Form and forwards it to the principal within a recommended ten (10) working days of the conference.

## Step-by-Step Principal Evaluation Process

### Summative Evaluation (All Domains)

The Summative Evaluation covers Domains One through Four of the evaluation and includes all the forms completed by both the principal and the evaluator over the course of the evaluation cycle. Also included in the Summative Evaluation is the content of conferences held during the evaluation cycle.

#### Summative Conference

Principal evaluation cycle consists of one school-year.

- The principal completes Section 1 of the Professional Responsibilities and Goal(s) Form and submits it to the evaluator before the goal setting conference.
- The evaluator and the principal conference is held prior to the beginning of school to discuss professional responsibilities and goal(s).
- The evaluator and the principal meet for a Formative Conference at least once, generally mid-year, to discuss professional responsibilities, progress toward goal(s), and other issues of concern.
- The evaluator completes the Formative Feedback Form and forwards it to the principal within a recommended ten (10) days of the Formative Conference.
- The principal completes Section 2 of the Professional Responsibilities and Goal(s) Form prior to the Summative Conference.
- The Summative Conference is held at the end of the cycle. All of the documents, evidence, and discussions that took place during the cycle may become part of the Summative Evaluation.
- Within a recommended ten (10) days, the evaluator completes the Summative Evaluation Form and forwards it to the principal. The Summative Conference sets the stage for the development of goal(s)s for the ensuing year.

#### Summative Evaluation Form

##### Purpose

- The Summative Evaluation Form provides written feedback about the performance of the principal related to all four domains of Montana-EPAS and the principal's goals.
- The Summative Evaluation Form is a written record of the conversations which took place during the Summative Conference. All of the evidence submitted in support of all four domains and the principal's goal(s), as well as all conferences and written documents generated during the evaluation cycle may be considered when completing the Summative Form.
- The content of the form is based on the evidence from conferences, artifacts presented and forms completed by both principal and evaluator.
- The Summative Evaluation Form includes the evaluator ratings of principal performance on each domain of the Montana-EPAS, and an overall rating of principal performance.

## Step-by-Step Principal Evaluation Process

### Descriptions of four overall ratings

**Unsatisfactory** - Little or no knowledge and minimal implementation of leadership standards. Does not meet minimal leadership standards and needs substantial improvement.

**Developing** - Evidence of novice performance; fundamental knowledge and implementation of leadership standards. Integration of leadership standards is inconsistent. Principal is making progress towards proficiency.

**Proficient** - Evidence of solid performance; strong knowledge, implementation, and integration of leadership standards; clear evidence of proficiency and skill in the domain/component.

**Exemplary** - Evidence of exceptional performance; outstanding knowledge, implementation, and integration of leadership standards along with evidence of leadership initiative and willingness to model and/or serve as a mentor for colleagues.

## Step-by-Step Principal Evaluation Process

### Improvement Plans

An Improvement Plan may be developed for a principal who receives an overall rating of “Unsatisfactory” on any domain on the Summative Evaluation Form.

#### Improvement Plan Form

Improvement Plans must include the following:

- Identification of the specific area(s) for improvement and recommended area(s) for growth.
- Measurable goals for improving the area(s) for improvement to satisfactory levels.
- Clear and specific professional growth activities to accomplish the goal(s).
- Resources for each professional growth activity must be identified and made accessible to the principal.
- Procedures and evidence that must be provided and/or behaviors to determine that the goal(s) were met.
- Timelines, including intermediate progress checkpoints and a final completion date, must be specified.
- Record of judgment and date completed, signed by the principal and evaluator.

#### Process

- The evaluator and the principal will cooperatively develop the plan.
- If the plan cannot be cooperatively developed, the evaluator determines the plan.
- The principal is held accountable for the implementation and completion of the Improvement Plan.
- Upon completion of the Improvement Plan, the principal and the evaluator will sign the documentation that determines the satisfactory or unsatisfactory completion of the plan.

# **MONTANA EDUCATOR PERFORMANCE APPRAISAL SYSTEM (MONTANA-EPAS)**

**A State Model for Principal Evaluation  
Principal Evaluation Rubrics and Indicators**



## Domain One: Vision and Goals

	<b>Unsatisfactory</b>	<b>Developing</b>	<b>Proficient</b>	<b>Exemplary</b>
<p><b>Assessing Data</b> Principal, in collaboration with others, uses multiple sources of information and assists in analyzing data to establish rigorous and concrete school improvement goals in the context of student achievement and instructional programs.</p>	Rarely utilizes student achievement data to develop clear and rigorous school improvement goals.	Utilizes student achievement data to develop school improvement goals but the goals may lack clarity or rigor and/or goals are not developed collaboratively.	Utilizes student qualitative and quantitative data to collaboratively diagnose the current state of the school, inform decision making processes and develop rigorous, concrete school improvement goals.	Engages staff to analyze quantitative and qualitative data to diagnose the current state of the school, inform decision making processes and develop rigorous, concrete school improvement goals.
<p><b>Implementing Vision &amp; Goals</b> Principal provides leadership for major initiatives and change efforts relative to the school improvement goals. Principal is committed to doing the work required for continuous school improvement.</p>	Rarely share strategies to achieve school improvement goals; provides minimal support to staff through the change process; easily loses focus on improving student achievement.	Drafts a strategic plan that identifies strategies for achieving school improvement goals; supports staff in the change process at a minimal level; believes in the potential for improving student achievement.	Develops and implements a strategic plan with milestones and strategies to achieve school improvement goals; supports staff in the change process by encouraging questions and dialogue; focuses actions and conversations on improving student achievement.	Engages staff in developing and implementing a strategic plan with milestones and strategies to meet school improvement goals; proactively leads staff through the change process creating opportunities to express opinions/perceptions; focuses all actions and conversations on improving student achievement.
<p><b>Promoting Vision and Goals</b> Principal promotes high expectations for teaching and learning. Principal is committed to ensuring that all students have the knowledge and skills necessary to succeed in future educational activities.</p>	Lacks a vision that focuses on student achievement for all students; learning experiences are not aligned with a continuous school improvement plan.	Creates a vision for high student achievement; implements learning experiences that generally align with a continuous school improvement plan.	Develops a vision for high student achievement and career/ college readiness for all students and effective teaching for all staff; works with staff to implement effective learning experiences aligned with a continuous school improvement plan.	Engages diverse stakeholders in collaboratively developing a vision of high student achievement and career/college readiness for all students and effective teaching for all staff; builds capacity of staff to deliver quality learning experiences aligned to a continuous school improvement plan.
<p><b>Communicating Vision and Goals</b> Principal communicates effectively to stakeholders about progress towards meeting school improvement goals. Principal participates in a process to regularly monitor, evaluate and revise a continuous school improvement plan.</p>	Shares inaccurate and/or incomplete information with stakeholders about progress toward school improvement goals; rarely connects student achievement data with a continuous school improvement plan.	Shares limited information with stakeholders about progress toward meeting school improvement goals; connects student achievement data with continuous school improvement in a limited fashion.	Utilizes two-way communication with stakeholders to share the progress toward meeting school improvement goals. Develops and implements systems to analyze data to monitor progress and implement revised strategies to a continuous school improvement plan.	Facilitates effective two-way communication structures with stakeholders to share progress toward school improvement goals; engages staff to analyze formative and summative data to monitor, evaluate, and a continuous school improvement plan.



## Domain Two: Culture of Learning

Criteria for Evaluation	Unsatisfactory	Developing	Proficient	Exemplary
<p><b><u>Advocating a Culture of Learning</u></b> Principal provides leadership for assessing, developing, and improving school culture and instructional programs conducive to student learning. Principal articulates the desired school instructional program and shows evidence of how the principal reinforces the instructional program and culture.</p>	Rarely fosters a culture that focuses on learning by supporting a curriculum that is based on the District’s standards; rarely ensures that staff implements instructional strategies that support student learning.	Attempts to foster a culture focused on student learning by developing and supporting implementation of the District’s standards; provides limited support in the use of instructional strategies or pedagogical methods that support student learning.	Supports a culture focused on student learning by implementing rigorous curriculum aligned to the District’s standards; supports staff in implementing rigorous instructional strategies and pedagogical methods that support student learning.	Develops a culture focused on student learning by implementing rigorous curriculum aligned to the District’s standards; engages staff to implement rigorous instructional strategies and pedagogical methods that support student learning.
<p><b><u>Monitoring a Culture of Learning</u></b> Principal participates in monitoring and evaluating the effectiveness of curriculum, instruction, or assessment. Principal evaluates staff and provides ongoing coaching for improvement. Principal uses a variety of sources of information to make decisions.</p>	Completes district evaluation system based on limited evidence; classroom observation feedback is based on limited data; rarely holds teachers accountable for implementing feedback; rarely uses student outcomes or teacher practice to make decisions on instructional improvement and teacher effectiveness.	Completes district evaluation system based on adequate evidence; classroom observation feedback is global and not specific; attempts to hold teachers accountable for implementing feedback; uses some evidence of teacher practice and student outcomes to make decisions on instructional improvement and teacher effectiveness.	Implements a consistent district evaluation system based on solid evidence; provides actionable feedback based on evidence gathered by frequent formal and informal observations; ensures teachers implement feedback; uses evidence of teacher practice and student outcomes to make decisions on instructional improvement and teacher effectiveness.	Implements a rigorous, consistent district evaluation system based on clear, concise evidence; provides continuous, actionable feedback based on evidence gathered by frequent formal and informal observations; closely monitors teachers to ensure they implement feedback; uses multiple sources of evidence of teacher practice and student outcomes to make decisions on instructional improvement and teacher effectiveness.
<p><b><u>Sustaining a Culture of Learning</u></b> Principal helps to ensure that staff has professional growth opportunities that enhance student learning. Principal is accessible to, approachable by, and is visible in the school community. Principal supports the use of technology as appropriate in learning.</p>	Provides minimal staff opportunities to enhance performance and grow leadership; rarely interacts with or is accessible to the school community; rarely fosters proper use of technology to support teaching and learning.	Facilitates undifferentiated learning opportunities to enhance staff performance; only provides leadership opportunities for interested staff; inconsistently interacts with and is accessible to the school community; identifies technology that meets some student learning needs.	Provides professional learning opportunities based on staff needs to enhance performance; provides effective teacher leadership opportunities to all staff; interacts with and is accessible to the school community; supports technology that meets student learning needs.	Implements individually tailored professional learning opportunities based on the current learning theories to enhance staff performance; supports staff in leading professional development; interacts with and is accessible to the school community; integrates technology into learning to meet student needs.
<p><b><u>Maintaining a Culture of Learning</u></b> Principal systematically and fairly recognizes accomplishments of students and staff. Principal uses data analysis to instill the importance of continually developing programs and instructional strategies.</p>	Rarely recognizes the accomplishments of staff and students; rarely collects data to draw conclusions about instruction; rarely attempts to ensure that instruction is differentiated.	Recognizes the accomplishments of some staff and students; inconsistently collects data to draw conclusions about instruction; inconsistently ensures differentiation is used to meet student learning needs.	Systematically and fairly recognizes the accomplishments of staff and students; consistently monitors data to drive continuous improvement; analyzes data to differentiate instruction to meet student needs.	Engages staff to systematically and fairly recognize the accomplishments of colleagues and students; monitors and collects quantitative and qualitative data to drive continuous improvement; guides all staff in analyzing data to differentiate instruction to meet student needs.

## Domain Three: Management

Criteria for Evaluation	Unsatisfactory	Developing	Proficient	Exemplary
<p><b><u>Solving Problems or Concerns</u></b> Principal addresses and resolves issues as they arise in a timely manner and works to prevent potential problems. Operational procedures are designed and managed to maximize opportunities for learning for all students.</p>	<p>Reacts with frustration when faced with challenges; rarely resolves issues in a timely manner; inconsistently demonstrates confidence in the potential of all students to achieve high levels; rarely addresses situations where students are systemically excluded from high-quality learning opportunities.</p>	<p>Attempts to problem solve, but struggles when faced with challenges; resolves issues when they arise; principal states belief that all students can achieve at high levels; provides most students with access to high-quality learning opportunities.</p>	<p>Leads staff in problem-solving processes to address challenges; quickly resolves issues as they arise; Builds expectations for students, staff, and parents that success is possible for all students; implements equitable systems to ensure all students have access to high quality learning opportunities.</p>	<p>Engages staff to proactively problem solve to address challenges; effectively and decisively resolves issues as they arise; publicly models the belief that every student has the potential to achieve at high levels; implements equitable systems and procedures to ensure all students have access to high-quality learning opportunities.</p>
<p><b><u>Managing Resources</u></b> Principal manages fiscal and physical resources responsibly, efficiently and effectively. Principal protects instructional time by managing operational procedures in such a way as to maximize learning. Principal efficiently uses time management so that teaching and learning are a high priority.</p>	<p>Allocates fiscal and physical resources that do not align with a continuous school improvement plan; allows distractions to interfere with learning time; rarely plans and prioritizes own time and neglects to protect time for instructional leadership activities.</p>	<p>Allocates fiscal and physical resources based on a continuous school improvement plan; seeks information about additional resources; develops some routines to maximize instructional time; plans own schedule to address instructional leadership but is inconsistent with how time is spent.</p>	<p>Allocates fiscal and physical resources in alignment with student achievement-oriented continuous school improvement plan; seeks additional resources to fill gaps; implements schedules and routines to maximize instructional time; plans own schedule to prioritize instructional leadership activities.</p>	<p>Creatively leverages fiscal and physical resources responsibly, efficiently and effectively; actively accesses additional resources that align with a continuous school improvement plan; implements schedules and routines to maximize instructional time; plans own schedule for the year, week and day to prioritize instructional leadership activities.</p>
<p><b><u>Complying with Policies and Procedures</u></b> Principal complies with federal and state law and district policies. School and /or district contracts are effectively managed. Principal maintains confidentiality and privacy of school records, including student or staff information.</p>	<p>Allows school operations that do not comply with federal and state law and district policies; rarely fulfills reporting requirements; rarely manages contractual agreements; has breached confidentiality or released private school and/or district records unnecessarily.</p>	<p>Attempts to align school-wide behavior plan and inconsistently supports staff in implementing it; fulfills most reporting requirements; inconsistently manages contractual agreements; maintains confidentiality and privacy of school and/or district records.</p>	<p>Ensures all school operations comply with federal and state law and district policies; fulfills reporting requirements in a timely manner; manages school contractual agreements effectively; maintains confidentiality of school and/or district records.</p>	<p>Collaborates with district office to implement systems to ensure all school operations comply with federal and state law and district policies; fulfills all reporting requirements in a timely manner; includes staff in implementing contractual agreements effectively; ensure staff maintains the highest level of confidentiality and privacy.</p>
<p><b><u>Protecting the Welfare and Safety of Students and Staff</u></b> Principal works to ensure a safe and secure school environment and a culture that is conducive to teaching and learning. Challenges that could potentially interrupt teaching and learning are addressed and resolved.</p>	<p>Inconsistently implements a school-wide behavior plan; tolerates discipline violations; minimally supports student’s emotional and social development; rarely reviews and updates school safety procedures to ensure a safe school.</p>	<p>Develops a school-wide behavior plan and supports staff in implementing it; attempts to fairly apply consequences; periodically reviews discipline data; provides support for student’s emotional and social development; manages a safe school.</p>	<p>Leads staff in creating a positive culture through the implementation of clear classroom and school-wide behavior plans; supports staff’s consistent and fair implementation of classroom and school wide behavior plans; tracks student discipline data; supports students’ emotional and social development; reviews and refines school safety procedures to ensure a safe school.</p>	<p>Engages staff and students to create a positive school culture by clearly articulating and implementing classroom and school-wide behavior plans, including systems to ensure consistent and fair implementation; tracks student discipline data ensuring equitable application of the consequences; builds capacity of the staff to support and enhance students’ emotional and social development; continually assesses and refines school procedures to ensure a safe school.</p>

## Domain Four: Professional Responsibilities

Criteria for Evaluation	Unsatisfactory	Developing	Proficient	Exemplary
<p><b><u>Maintaining Professional Relationships</u></b> Principal fosters and maintains positive professional relationships with the school community. Principal is respectful of other’s opinions and demonstrates an appreciation and sensitivity to diversity in the school community.</p>	<p>Avoids building positive relationships with adults and/or students; avoids conversations about diversity and demonstrates limited awareness of the impact of diversity on student learning; does not correct inappropriate/ insensitive statements directed at members of the school community.</p>	<p>Attempts to build professional relationships with adults and students; participates in conversations about diversity and culture, but rarely initiates conversations or connects them to student learning; provides whole group undifferentiated professional development about working in and supporting a diverse community; attempts to correct intolerant statements directed at the school community with limited success.</p>	<p>Builds positive professional relationships with adults and students; initiates conversations about diversity and culture as well as about how they may impact student learning; provides formal and informal professional development to improve staff understanding of how their personal experiences inform their assumptions about students and the school community; corrects intolerant statements directed at members of the school community.</p>	<p>Builds and maintains positive, trusting professional relationships with adults and students; builds the school’s collective capacity to engage in courageous conversations about diversity and culture and how they may impact student learning; leads staff through a process to understand how their personal experiences shape their interpretations of the world and leads them through a process to identify student’s strengths and weaknesses; corrects intolerant statements directed at members of the school community.</p>
<p><b><u>Promoting Family and Community Involvement</u></b> Principal collaboratively works to establish a culture that encourages and welcomes families and community members and seeks ways to engage them in student learning.</p>	<p>Rarely welcomes families and community members into the school or engages them in student learning.</p>	<p>Sets expectations for staff on the process for welcoming families and community members into the school; communicates key information about student learning to families and the community and identifies some ways they can support students’ learning.</p>	<p>Welcomes all families and community members into the school, shares explicit information about student learning expectations with families and the community and identifies specific ways they can participate in and support students’ learning.</p>	<p>Creates a school-wide culture in which all families and community members are welcomed into the school; builds capacity of staff to implement multiple structures to meaningfully engage families and the community in achieving school a continuous school improvement plan and priorities.</p>
<p><b><u>Demonstrating Fairness</u></b> Principal is fair and consistent when engaging students and staff. Principal demonstrates values, beliefs and attitudes that inspire all students and staff to higher levels of performance.</p>	<p>Rarely demonstrates fairness when engaging students and staff; rarely demonstrates confidence in the potential of all students to perform at high levels.</p>	<p>Inconsistently demonstrates fairness when engaging students and staff; asserts belief that all students and staff can meet high expectations.</p>	<p>Acts with fairness and consistency when engaging students and staff; builds high expectations among staff, students, and parents that success is possible for all students.</p>	<p>Publicly models fairness and consistency when engaging with students and staff, and builds staff capacity to be fair and consistent with students; demonstrates values, beliefs, and attitudes that reflect high expectations for all students and adults.</p>
<p><b><u>Growing and Developing Professionally</u></b> Principal welcomes positive feedback on professional growth. Principal chooses and participates in professional development that is aligned with his or her professional needs and aligned with the needs of the school or district.</p>	<p>Unwilling to accept feedback or adjust leadership practice; resistant to engaging in professional learning opportunities aligned with the needs of the school.</p>	<p>Demonstrates a non-defensive attitude in receiving feedback on own professional practice; engages in some professional learning opportunities aligned with the needs of the school.</p>	<p>Seeks feedback on own professional practice, self-reflects, and adjusts professional practice based on that feedback; engages in professional learning opportunities aligned with the needs of the school.</p>	<p>Models and engages staff to seek feedback on their own professional practice, self-reflect, and adjust their professional practice based on that feedback.</p>

# **MONTANA EDUCATOR PERFORMANCE APPRAISAL SYSTEM (MONTANA-EPAS)**

**A State Model for Principal Evaluation  
Principal Evaluation Forms**

August 2022



## Principal Professional Responsibilities and Goal(s) Form

Principal	<input type="text"/>	School Year	<input type="text"/>
School	<input type="text"/>	Date	<input type="text"/>

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### SECTION 1

**Principal develops one to four goals, completes Section 1 of the form and brings the completed form to the Professional Responsibilities and Goal(s) Conference.**

#### August - September

1.1 Using the goals from the school and/or district improvement plan, identify area(s) of need you will focus on during this school year.

1.2 Identify the measurable indicator(s) and methods of measurement you will use to show student progress in the area(s) identified in 1.1.

1.3 List professional learning activities that you will engage in and describe how these activities align to your professional needs and those of the school and/or district?

## Principal Professional Responsibilities and Goal(s) Form

1.4 How do you plan to welcome and engage families in student learning?

Date of Conference

Principal Signature

Date

Evaluator Signature

Date

# Principal Professional Responsibilities and Goal(s) Form

## SECTION 2

Complete Section 2 of the Professional Responsibilities and Goal(s) Form and provide a copy to your evaluator prior to the Summative Conference. Attach applicable documents.

### April - May

2.1 Summarize your school and/or district progress in the area(s) of need as shown by the indicators identified in the beginning of the school year in Section 1.1.

2.2 If you met your goal(s), what conditions were most helpful? If you did not meet your goal(s), what were your obstacles or barriers?

2.3 Describe how you maintain professional relationships with staff and how you demonstrate sensitivity to diversity within the school and the community.

## Principal Professional Responsibilities and Goal(s) Form

2.4 Explain how you work collaboratively with staff, faculty and community to establish a culture that encourages and welcomes families and community members. How do you encourage families and communities to engage in student learning?

2.5 Explain how you deal fairly and consistently with students and staff. Provide evidence of expression of your values, beliefs and attitudes that inspire students and staff to higher levels of performance.

2.6 Provide evidence of the professional learning activities that you participated in and how they align to your professional needs and those of the school and/or district.

Date of Conference

Principal Signature

Date

Evaluator Signature

Date



## Principal Formative Feedback Form

Principal

School Year

School

Date

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**This form is used to record the content of conferences, agreed upon goals or performance expectations, and other pertinent information either party wishes to record.**

### Domain One: Vision and Goals

Narrative

### Domain Two: Culture of Learning

Narrative

# Principal Formative Feedback Form

## Domain Three: Management

Narrative

## Domain Four: Professional Responsibilities

Narrative

## Summary

Principal and evaluator sign the Formative Feedback Form to indicate that the form was reviewed and discussed, not that the principal necessarily agrees with the observation or comments on this form.

Principal Signature

Date

Evaluator Signature

Date

## Principal Summative Feedback Form (All Domains)

Principal

School Year

School

Date

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### DOMAIN ONE: VISION AND GOALS

- Principal, in collaboration with others, such as the school and/or district improvement team or board, uses multiple sources of information and assists in analyzing data to establish rigorous and concrete school and/or district improvement goals in the context of student achievement and instructional programs.
- Principal provides leadership for major initiatives and change efforts relative to the school and/or district improvement goals. Principal is committed to doing the work required for continuous school and district improvement.
- Principal promotes high expectations for teaching and learning. Principal is committed to ensuring that all students have the knowledge and skills necessary to become successful in future educational activities.
- Principal communicates effectively to appropriate stakeholders about progress toward meeting the school and/or district improvement plan goals. Principal participates in a process to regularly monitor, evaluate and revise school and/or district improvement goals.

### COMMENDATIONS/RECOMMENDED AREA(S) OF GROWTH

Unsatisfactory

Developing

Proficient

Exemplary

## Principal Summative Feedback Form (All Domains)

### DOMAIN TWO: CULTURE OF LEARNING

- Principal provides leadership for assessing, developing, and improving the school and/or district culture and instructional program that is conducive to student learning. Principal articulates the desired school and/or district instructional program and shows evidence about how he or she reinforces the instructional program and culture.
- Principal participates in monitoring and evaluating the effectiveness of the curriculum, instruction, or assessment of students. Principal evaluates staff and provides ongoing coaching for improvement. Principal uses a variety of sources of information to make decisions.
- Principal helps to ensure that staff has professional growth opportunities that enhance staff's performance and improve student learning. Principal is accessible and approachable by staff, families, and community and is visible in the school and/or district community. Principal supports the use of technology as appropriate in teaching and learning.
- Principal systematically and fairly recognizes accomplishments of staff and students toward a positive school and/or district culture. Principal uses and analyzes data to instill the importance of continually developing programs and strategies to enhance opportunities for learning.

### COMMENDATIONS/RECOMMENDED AREA(S) OF GROWTH

Unsatisfactory

Developing

Proficient

Exemplary

## Principal Summative Feedback Form (All Domains)

### DOMAIN THREE: MANAGEMENT

- Principal addresses and resolves issues as they arise, in a timely manner, and works to prevent potential problems. Operational procedures are designed and managed to maximize opportunities for learning for all students.
- Principal manages fiscal and physical resources responsibly, efficiently, and effectively. Principal protects instructional time by managing operational procedures to maximize learning. Principal efficiently manages his or her time so that teaching and learning are a high priority.
- Principal complies with federal and state law and district policies. School and/or district contractual agreements are effectively managed. Principal maintains confidentiality and privacy of school and/or district records, including student and staff information.
- Principal works to ensure a safe and secure school and/or district environment and a culture that is conducive to teaching and learning. Challenges that could potentially interrupt teaching and learning are addressed and resolved.

### COMMENDATIONS/RECOMMENDED AREA(S) OF GROWTH

Unsatisfactory

Developing

Proficient

Exemplary

## Principal Summative Feedback Form (All Domains)

### DOMAIN FOUR: PROFESSIONAL RESPONSIBILITIES

- Principal fosters and maintains positive professional relationships with staff. Principal is respectful of others' opinions and demonstrates an appreciation for and sensitivity to diversity in the school and/or district community.
- Principal collaboratively works to establish a culture that encourages and welcomes families and community members and seeks ways in which to engage families and community members in student learning.
- Principal is fair and consistent when dealing with students and staff. Principal demonstrates values, beliefs, and attitudes that inspire all students and staff to higher levels of performance.
- Principal chooses and participates in professional growth that is aligned with his or her professional needs or aligned with the needs of the school and/or district.

### COMMENDATIONS/RECOMMENDED AREA(S) OF GROWTH

Unsatisfactory

Developing

Proficient

Exemplary

**Principal Summative Feedback Form  
(All Domains)**

**SUMMATIVE EVALUATION RATING**

Unsatisfactory

Developing

Proficient

Exemplary

**IMPROVEMENT PLAN REQUIRED FOR:**

**DOMAIN ONE**

**DOMAIN TWO**

## Principal Summative Feedback Form (All Domains)

### DOMAIN THREE

### DOMAIN FOUR

The principal and evaluator sign the Summative Evaluation Form to indicate that it was reviewed and discussed, not that the principal necessarily agrees with comments on this form.

Principal Signature  Date

Evaluator Signature  Date



## Principal Improvement Plan Form

Principal  School Year

School  Date

Area(s) for Improvement

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**The principal and evaluator will collaboratively develop the Improvement Plan at an Improvement Plan Conference. If consensus between the principal and evaluator is not reached, the evaluator develops the Improvement Plan.**

1. Identify specific Area(s) For Improvement (AFI) and recommended areas of growth related to one or more of the Montana-EPAS domains.

2. List specific measurable goals for improving the AFI and recommended growth areas to satisfactory levels.

## Principal Improvement Plan Form

3. Identify resources and strategies necessary to implement the Improvement Plan.

4. List evidence that must be submitted to evaluate growth and improvement of the identified AFI or recommended areas of growth.

5. Identify a timeline for completion of the Improvement Plan, along with times for intermediate checkpoints.

## Principal Improvement Plan Form

6. Indicate how satisfactory performance as defined by the Improvement Plan will be determined.

My signature below means that I received the Improvement Plan, understand what is expected of me, and will work on the plan as described.

Principal Signature  Date

My signature below means that I carefully reviewed the Improvement Plan with the principal and clearly communicated what is expected of the principal to complete the plan.

Evaluator Signature  Date

## Principal Improvement Plan Form

### Amendments to the Improvement Plan

If the Improvement Plan is amended during the implementation, specify changes.

Principal Signature	<input type="text"/>	Date	<input type="text"/>
Evaluator Signature	<input type="text"/>	Date	<input type="text"/>

### Completion of Improvement Plan

The principal has completed the Improvement Plan as described.

Satisfactory       Unsatisfactory

Principal Signature	<input type="text"/>	Date	<input type="text"/>
Evaluator Signature	<input type="text"/>	Date	<input type="text"/>

# MONTANA EDUCATOR PERFORMANCE APPRAISAL SYSTEM

(MONTANA-EPAS)

