

Principal Performance Appraisal Process

Superintendent/Principal/Vice-Principal Guide



Superintendents-Use mVal Software to:

- View & Sign Off Annual Growth Plans created by your Administrators
- View & Sign Off Performance Plans created by your Administrators

Principals-Use mVal Software to:

- View & Sign Off Annual Growth Plans created by your Vice Principal(s)
- View & Sign Off Performance Plans created by your Vice Principal(s)
- Write & Sign Off your Summative Reports on your Vice Principal(s)
- Write & Sign Off your own Annual Growth Plan
- Write & Sign Off your own Performance Plan

Vice Principals-Use mVal Software to:

- Write & Sign Off your own Annual Growth Plan
- Write & Sign Off your own Performance Plan
- Sign Off on your Summative Report

Key Messages:

mVal is a web-based application that will be used by Administrators to generate Performance Plan Appraisals and Annual Growth Plans. It is a secure website that may be accessed via *your login page*.

mVal electronically houses all completed Performance Plan Appraisals and Annual Growth Plans

There are 3 components to the mVal software application in regards to Principal Performance Appraisal:

- a) Annual Growth Plan
- b) Performance Plan Appraisal
- c) Summative Report

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Section 1 – How to Create Your “Group” in Order to Conduct a PPA

NOTES:

(some districts are importing group membership and this step is taken care of automatically, this is only applicable if you are not importing groups)

Each SO must create a group.

Each Principal must create a group

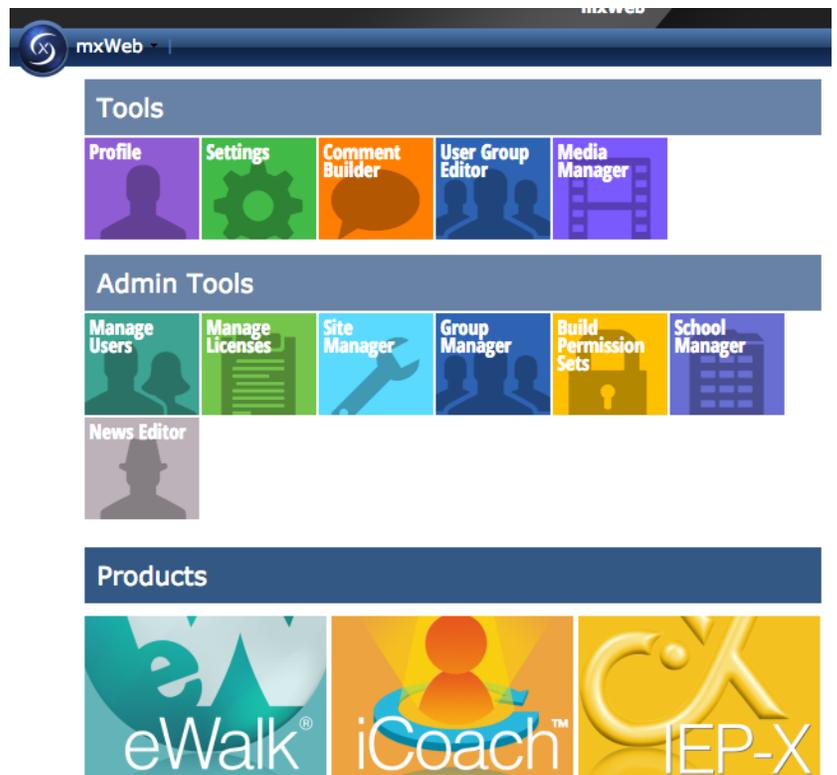
Vice Principals DO NOT create groups.

Each administrator is able to create their own Annual Growth Plan and Performance Plan

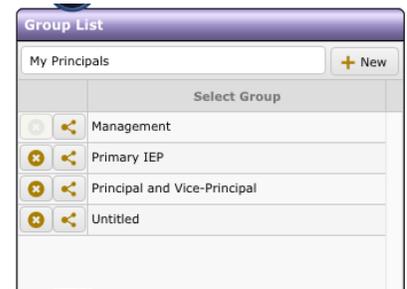
Superintendents need access to documents created by their principals in order to create the Summative Report

Principals need access to the documents created by their vice principals in order to create the Summative Report

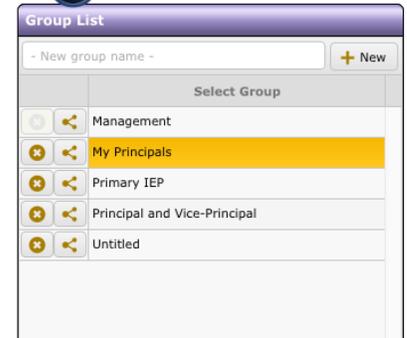
1. Log into mVal
2. Locate the icon Group Manager (located under Admin Functions on the Home Page)
3. Click on Group Manager



- On the left side of your screen, enter a group name and click **New**



- This will create your group and you will now see the group name highlighted in the list.



- Use the **'Select Site'** dropdown to select your school, use the **'Select Profile'** dropdown to select **'Principal'**. Your list will filter to just selected principals. Use the checkbox provided to choose the principals you are required to evaluation and use the button **'Add Members'** to add them to your group. Their names will appear in the lower window **'Group Editor'**.

Search Member

Select Site: Demonstration Elementary School Select Profile: Principal Advanced Filters (0)

+ Add Members Select members to add to the current group : 0 selected : The member is already in the current group

<input type="checkbox"/>	Last Name	First Name	Unique ID	Profile	Title	Site
<input type="checkbox"/>		Andrew L.		Principal		Demonstration Elementar...
<input checked="" type="checkbox"/>	Amigos	Helen	123456789101112	Principal	Principal	Demonstration Elementar...
<input checked="" type="checkbox"/>	Day	Yvonne test	yday1	Principal		Demonstration Elementar...
<input type="checkbox"/>	demo	demo	3	Principal		Demonstration Elementar...
<input type="checkbox"/>	demo	demo	4	Principal		Demonstration Elementar...
<input type="checkbox"/>	demo	demo	9	Principal		Demonstration Elementar...
<input type="checkbox"/>	demo	demo	10	Principal		Demonstration Elementar...

1 2 30 members per page 1 - 30 of 44 members

Group Editor

Group ID: - Group ID - Group Name: My Principals Group Code: - Group code - Save

X Remove Members Select members to remove from to the current group : 0 selected : The member is deactivated

<input type="checkbox"/>	Last Name	First Name	Unique ID	Profile	Title	Site
<input type="checkbox"/>	Amigos	Helen	123456789101112	Principal	Principal	Demonstration Elementar...
<input type="checkbox"/>	Day	Yvonne test	yday1	Principal		Demonstration Elementar...

- Click Done when you have finished to return to the main mxweb menu.

Section 2 – Writing Annual Growth Plans

NOTES:

Principals and Vice Principals Create Their Own Annual Growth Plans.

Annual Growth Plans Can Be Viewed By Those Conducting Your Appraisal

An Annual Growth Plan is created each year in the 5 year cycle, including the evaluation year by the appraisee (e.g., four non-evaluation years and one evaluation year).

Every principal and vice-principal will develop an annual growth plan by November 30th of each school year

The appraisee in consultation with the appraiser identifies one or two Goals and the strategies to meet the Goals

Chosen strategies are based on and aligned with:

The Ontario Leadership Framework, Board Multi-year plan, the Board Improvement Plan for Student Achievement, and the School Improvement Plans for Student Achievement

It is important to have coaching conversations with the Supervisory Officer/Principal that support the appraisee's goal achievement.

LAST NOTE: You are not allowed to approve your own self- reflecting document.

You may postpone the setting of the Date as well as the setting of the Form Status to Completed until a later time.

Principals will review Vice-Principals Annual Growth Plans

Superintendents will review Principals Annual Growth Plans

Once **Done** has been clicked the form portal is displayed again

mVal Instructions:

1. After logging in, click on the **mVal** icon.
2. Click **Appraise/Report**.
3. Click **Principal Performance Appraisals**.



Use the **Select Group** drop-down to select **My Documents**

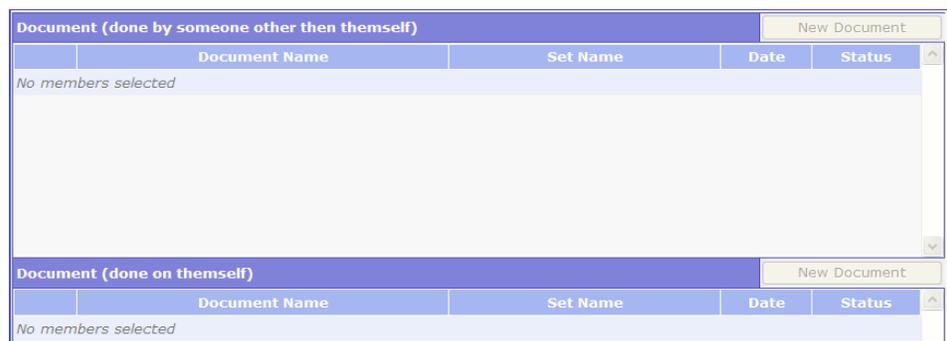
Two Sections Now Appear:

Top Section: documents that 'other people' are going to do about you. **(done by someone other than themselves)**

Bottom Section: documents that you are creating. **(done on themselves)**

The program recognizes who has logged into the system and separates documents...

4. Click **New Document** button in bottom right pane. You are doing a document on yourself!



5. You may edit the **Document Name** by typing in the **Document Name** box.

Member Name	Helen Amigos
Assignment/Title	Principal
Document Name	Growth Plan 2016-2017
Select Set	Principal / Vice Principal Growth Plan [Framework]
Select Form	<input checked="" type="checkbox"/> Principal's and Vice-Principal's Growth Plan (Ontario)
Select Checklist	<none>



6. The **Select Set** drop-down is used to select the type of document you want to open (in this example: Principal/Vice-Principal Growth Plan).
7. Click the **Next** button. The **Growth Plan** form portal is displayed.

Member Name	Ms. Helen Amigos
Member Role	Principal
Member Assignment/Title	Principal
Document Name	 Growth Plan 2016-2017
Date Created	10-26-16
Set Name	Principal / Vice Principal Growth Plan [Framework]
Document Status	<input type="checkbox"/> Approved and completed by evaluator

	Form	Date	Form Status
	Principal's and Vice-Principal's Growth Plan (Ontario)	 Thu Oct 27 2016, 1:57 PM	In progress

8. You may use the **Calendar-and-Clock icon** to set the day and time associated with the appraisal.



9. You are now ready to complete the Annual Growth Plan template. Click on the **Form name: Principal's and Vice Principal's Growth Plan**

10. You are able to add one area for growth at a time, click **Add New Areas for Growth**

Document Name	Growth Plan 2016-2017	Form Status	
Staff Name	Ms. Helen Amigos	Name of School	Demonstration Elementary School
<div style="border: 1px solid red; padding: 2px;">+ Add New Areas for Growth</div>			
Areas for Growth	Growth Strategies/Supports	Target Dates for Completion	Suggested learning needs...
Buttons			

11. A work area will appear and you can create in each cell working left to right. You can edit within each cell, or delete the entire row by using the **Delete** button.

Areas for Growth	Growth Strategies/Supports	Target Dates for Completion	Suggested learning needs for next year	
				X Delete

12. You are able to write your Own Comments in each section, some suggested explanations for the column headings are:

- **Areas for Growth** column (in this column you Identify which of the 6 Domains from the Ontario Leadership Framework are targeted for growth),
- **Growth Strategies/Support** column (in this column you identify the Practices within the 6 Domains of the Leadership Framework),
- **Target Dates for Completion** column (in this column you identify your timelines),
- **Suggested Learning needs for next year** column (in this column you identify necessary Resources, Human, Financial and Material).

13. Click Save in the top tool bar (the form status will indicate “Form Saved”), when you are done.

Document Name	Growth Plan 2016-2017	Form Status	Form Saved
Staff Name	Ms. Helen Amigos	Name of School	Demonstration Elementary School
+ Add New Areas for Growth			

14. To authorize (sign) the form refer to the section: **Authorizing Growth Plans, Performance Plans and Summative Reports**. You may wish to do this now then return to step 18.

15. You may click the **Print icon**  in the top tool bar to print the form at any time.

16. Click the toolbar **Done icon**  to end the form editing session. The form portal is displayed again.

Member Name	Ms. Helen Amigos
Member Role	Principal
Member Assignment/Title	Principal
Document Name	 Growth Plan 2016-2017
Date Created	10-26-16
Set Name	Principal / Vice Principal Growth Plan [Framework]
Document Status	<input type="checkbox"/> Approved and completed by evaluator

	Form	Date	Form Status
	Principal's and Vice-Principal's Growth Plan (Ontario)	 Thu Oct 27 2016, 1:57 PM	In progress 

17. You may change the **Form Status** from **In progress** to **Completed** if you are satisfied that the document does not require any further changes.

Section 3 – Writing Performance Plan Appraisals

NOTES:

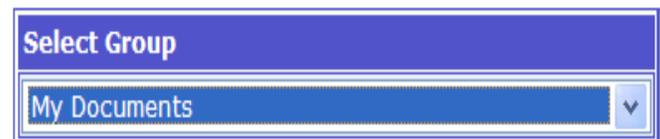
- The directions for writing the Performance Plan Appraisal are similar to the Annual Growth Plan
- The Performance Plan Appraisal must support the School Improvement Plan for Student Achievement and use the Board Multi-Year Plan and BIPSA. One or more goals should focus on improving student achievement.
- Within 20 days of the commencement of the school year, principals and vice-principals in their evaluation year must be notified of such by the Superintendent or Principal conducting the evaluation.
- Appraisal meetings will occur three times per year.
 - **Meeting #1** – Performance Plan developed and Annual Growth Plan updated (one or more goals focused on student achievement)
 - **Meeting #2**- Discussion of all information pertinent to the progress towards goals as outlined in the Performance Plan (editing)
 - **Meeting #3**-Review the results of the action taken to achieve goals, update Performance Plan and Annual Growth Plan
- During the Appraisal year a Growth Plan must also be completed
- Information from both the Annual Growth Plan and Performance Plan Appraisal must be used when completing the Summative Report
- Newly hired, experienced principals or experienced vice- principals, will be evaluated in their first year of employment with the HDSB
- Newly appointed principals or vice- principals, with no previous experience as a principal or vice- principal respectively, will be evaluated in their second year of employment. The evaluation year ends on June 30th of any year.
- Principal evaluations are conducted by Superintendents; vice- principals evaluations will be conducted by their principal.
- All administrators must complete a Performance Plan Appraisal on a 5 year cycle (e.g., four non- evaluation years and one evaluation year

mVal Instructions:

1. After logging in, click on the **mVal** icon.
2. Click **Appraise/Report**.
3. Click **Principal Performance Appraisals**.



Use the **Select Group** drop-down to select **My Documents**



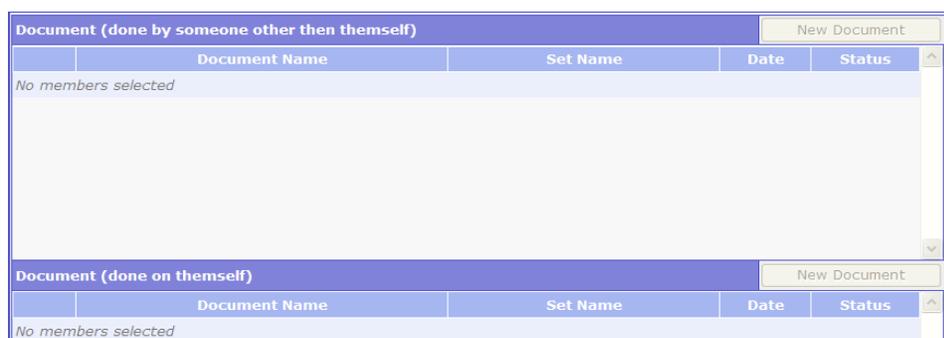
Two Sections Now Appear:

Top Section: documents that 'other people' are going to do about you. **(done by someone other than themselves)**

Bottom Section: documents that you are creating. **(done on themselves)**

The program recognizes who has logged into the system and separates documents.

4. Click **New Document** button in bottom right pane. You are doing a document on yourself!



5. You may edit the **Document Name** by typing in the **Document Name** box.

Member Name	Helen Amigos
Assignment/Title	Principal
Document Name	Document 3
Select Set	Principal / Vice Principal Performance Plan [Framework]
Select Form	<input checked="" type="checkbox"/> Principal's and Vice-Principal's Performance Plan (Ontario)
Select Checklist	<none>



6. The **Select Set** drop-down is used to select the type of document you want to open (in this example: Principal/Vice-Principal Performance Plan).
7. Click the **Next** button. The **Performance Plan form portal** is displayed.

Member Name	Ms. Helen Amigos		
Member Role	Principal		
Member Assignment/Title	Principal		
Document Name	Document 3		
Date Created	10-26-16		
Set Name	Principal / Vice Principal Performance Plan [Framework]		
Document Status	<input type="checkbox"/> Approved and completed by evaluator		
	Form	Date	Form Status
	Principal's and Vice-Principal's Performance Plan (Ontario)	Wed Nov 16 2016, 2:25 PM	In progress

8. You may use the **Calendar-and-Clock icon** to set the day and time associated with the appraisal. 
9. You are now ready to complete the Principal Performance Plan template. Click on the **Form name: Principal's and Vice Principal's Performance Plan**

10. Type in the field: **School and Community Characteristics and Circumstances.**

Document Name	Document 3	Form Status	
Staff Name	Ms. Helen Amigos	Name of School	Demonstration Elementary School
SCHOOL AND COMMUNITY CHARACTERISTICS AND CIRCUMSTANCES (e.g. rural context, demographic of student population, community partnerships etc.)			
<input type="button" value="+ Add New GOALS"/>			
GOALS	STRATEGIES	COMPETENCIES	INDICATORS
			RESULTS
			Buttons

11. You are able to create cells for one goal at a time. Click the **Add New Goals** button to display a set of cells.

12. You are able to type in each cell working left to right to complete one goal. Click the Add New Goals button again to create new goals. You can edit within each cell or delete an entire row by using the delete button at the end of the row.

<input type="button" value="+ Add New GOALS"/>					
GOALS	STRATEGIES	COMPETENCIES	INDICATORS	RESULTS	Buttons
					<input type="button" value="Update"/> <input type="button" value="Cancel"/>

13. You are able to write your Own Comments in each section, some suggested explanations for the column headings are:

- **Goals** column (in this column you identify which of the 6 Domains from the Ontario Leadership Framework are targeted for growth),

- **Strategies** column (in this column you identify necessary Resources, Human, Financial and Material),
- **Competencies** column (in this column you identify the Practices within the 6 Domains of the Leadership framework),
- **Indicators** column (in this column you identify your success benchmarks).
- **Results** column (in this column you identify the achieved goals) – consider leaving the column blank in the beginning of the year, returning to the form later, to complete the progress

14. Click Save in the top tool bar (the form status will indicate “Form Saved”), when you are done.

Document Name	Growth Plan 2016-2017	Form Status	Form Saved
Staff Name	Ms. Helen Amigos	Name of School	Demonstration Elementary School
+ Add New Areas for Growth			

15. To authorize (sign) the form refer to the section: **Authorizing Growth Plans, Performance Plans and Summative Reports**. You may wish to do this now then return to step 18.

16. You may click the **Print icon**  in the top tool bar to print the form at any time.

17. Click the toolbar **Done icon**  to end the form editing session. The form portal is displayed again.

Member Name	Ms. Helen Amigos
Member Role	Principal
Member Assignment/Title	Principal
Document Name	 Growth Plan 2016-2017
Date Created	10-26-16
Set Name	Principal / Vice Principal Growth Plan [Framework]
Document Status	<input type="checkbox"/> Approved and completed by evaluator

	Form	Date	Form Status
	Principal's and Vice-Principal's Growth Plan (Ontario)	 Thu Oct 27 2016, 1:57 PM	In progress 

18. You may change the **Form Status** from **In progress** to **Completed** if you are satisfied that the document does not require any further changes.

Section 4 – Writing Summative Reports

NOTES:

- Summative Reports are written by either the Principal or the Superintendent
- Information from both the Annual Growth Plan and Performance Plan Appraisal must be used when writing the Summative Plan
- The Summative report must be completed by June 30th of each school year and will be signed by both the appraiser and the appraisee.
- In instances where a rating of Unsatisfactory is likely to result, the appraiser is required to consult with the Superintendent and/or the Human Resources Executive Officer
- The Annual Growth Plan and Performance Plan Appraisal should both be used to complete the Summative Report
- Superintendents write Principal Summative Reports
- Principals write Vice- Principal Summative Reports
- Reports must be completed by June 30th of the current school year

mVal Instructions:

1. After logging in, click on the **mVal** icon.

2. Click **Appraise/Report**.

3. Click **Principal Performance Appraisals**.



4. You need to access the 'group' that you created earlier. This is outlined in the first section of this resource. Superintendents need to create a 'group' of their administrators and then access their group to find individual members. Principals create a group, which may only have one member, (their Vice Principals), in order to write Summative Reports. If you have not created your 'group' you will need to do this first, prior to continuing.

5. Use the **Select Group** dropdown to select the group of staff you have to appraise.



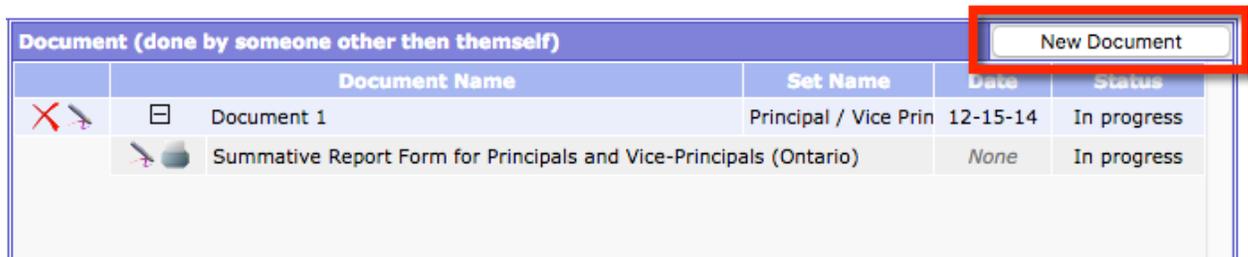
6. The appraises are listed in the Select Member box. Highlight over the administrator you want to appraise, then click to select.

7. Two Sections Now Appear:

Top Section: documents that ‘other people’ are going to do about the person **highlighted**. **(done by someone other than themselves)**. **This is the section you use to create a Summative, because the Summative is done by ‘someone’ else.**

Bottom Section: documents that the person **highlighted** has created. **(done on themselves)** **This is where you will find Growth Plans/Performance Plans that you can read, you don’t create them, the other person has done them on themselves.**

8. Click **New Document** button in top right pane.



Document (done by someone other than themselves)				
	Document Name	Set Name	Date	Status
	 Document 1	Principal / Vice Prin	12-15-14	In progress
	Summative Report Form for Principals and Vice-Principals (Ontario)		None	In progress

9. You have the ability to view the Growth Plan and Performance Plan of the person you are evaluating prior to writing the Summative Report. In the bottom right Document box you can see the appraisee’s Growth Plan and Performance Plan. The disabled **Delete icon** indicates that you are not allowed to delete it. The **Magnifying Glass (view)** icon indicates that you are allowed to view these documents but not edit.

10. Click the View icon beside either the Performance Plan or the Growth Plan to view. Click the Print icon to print either document if you wish a hard copy.

11. To start the Summative Report: Click the **New document** button in the top right Document box.

12. The new Summative Report document page is displayed. Click the Next button.

Member Name	Yvonne test Day
Assignment/Title	
Document Name	Document 2
Select Set	Principal / Vice Principal Summative Report [Framework]
Select Form	<input checked="" type="checkbox"/> Summative Report Form for Principals and Vice-Principals (Ontario)
Select Checklist	<none>



13. The Summative Report form status page is displayed.

Member Name	Yvonne test Day
Member Role	Principal
Member Assignment/Title	
Document Name	 Document 1
Date Created	12-15-14
Document created by	Helen Amigos
Set Name	Principal / Vice Principal Summative Report [Framework]
Document Status	<input type="checkbox"/> Approved and completed by evaluator

	Form	Date	Form Status
	Summative Report Form for Principals and Vice-Principals (Ontario)	 <No dates set>	In progress

14. To edit **Document Name**, click the **Pencil (Edit) icon**  in the **Document name**, type in the new name, and then click **Disk (Save)** . To edit the date click on the **Calendar-and clock icon** .

15. To enter the Summative Report and begin edits, click on the form name.

16. Use the Appraisal Year dropdown to select the school year of the appraisal.

Appraisee's Name	Yvonne test Day	Name of School	Demonstration Elementary School
Appraiser's Name	Helen Amigos	Name of Board	Demonstration District
Document Name	Document 1	Form Status	Editing
Appraisal Year	Performance Plan		Growth Plan
<Select Year>	<Select Performance Plan>	<Select Growth Plan>	
Instructions to the Principal/Vice-Principal (appraisee)			
<ul style="list-style-type: none"> At the beginning of the school year, the appraisee identifies the goals, strategies, indicators and related competencies of the <i>Performance Plan</i> in consultation with the appraiser. The appraisee also develops an <i>Annual Growth Plan</i> to support his or her development of the competencies and practices known to improve student achievement and which will support the implementation of the <i>Performance Plan</i>. At the end of the school year, the principal/vice-principal identifies the results achieved towards the goals of the <i>Performance Plan</i>. 			
Instructions to the Supervisory Officer/Principal (appraiser)			
<ul style="list-style-type: none"> At the beginning of the school year, the appraiser and appraisee will discuss the goals, strategies and indicators of the <i>Performance Plan</i> and the appraisee will approve the <i>Performance Plan</i>. The appraiser and appraisee will agree on the <i>Annual Growth Plan</i>. At the end of the school year, the appraiser must review with the appraisee, the results achieved towards the goals of the 			

17. You are able to attach any **Performance Plans and/or Growth Plans** that have been created by the person by using the drop-downs to attach the desired forms. When the Summative is created/printed the performance plan and growth plan will be part of the document. All the work contained in one document!

18. Add your comments in the white boxes (**scroll down to see entire template**).

19. You may click the toolbar **Spell Check icon**  to check/correct the spelling of the currently active text input box.

20. Click the toolbar **Disk Save icon**  to save your entries. It is recommended to click this icon every minute or so. Click the **Print icon**  to print the form.

21. To authorize (sign) the form refer to the section: **Authorizing Growth Plans, Performance Plans and Summative Reports**

22. When done change the **Form Status** from **In Progress** to **Complete**.

Member Name	Yvonne test Day	
Member Role	Principal	
Member Assignment/Title		
Document Name	Document 1	
Date Created	12-15-14	
Document created by	Helen Amigos	
Set Name	Principal / Vice Principal Summative Report [Framework]	
Document Status	<input checked="" type="checkbox"/> Approved and completed by evaluator	

Form	Date	Form Status
Summative Report Form for Principals and Vice-Principals (Ontario)	Thu Oct 20 2016, 02:57 PM	Completed

23. **CHECK:** Is the Document status box: **Approved and Completed by Evaluator**, checked off? It may have done so automatically. IF NOT, please check off in order to signify completion.

Section 5 – Authorizing Growth Plans, Performance Plans, and Summative Reports (Signing, Electronic Signatures)

Annual Growth Plans

1. Vice Principals/Principals author these to be signed first by themselves, then their direct reports.
2. When the document is complete. Check the **Authorization** box at the bottom of the form
3. You will receive a message to check.
4. You will be asked for your Password to verify
5. Enter your Password.
6. Select Authenticate.
7. The Supervisory Officer, or Principal (for Vice Principal) will replicate the process in order to complete.

A screenshot of an authentication dialog box with a blue border. It contains the following text and elements: "Username: amigo" in bold black text; "Password:" followed by a white rectangular input field; a "Cancel" button on the left and an "Authenticate" button on the right, both with rounded corners and a light gray background.

Performance Plans

1. Vice Principals/Principals author these to be signed first by themselves, then their direct reports.
2. When the document is complete. Check the authorization box at the bottom of the form
3. You will receive a message to check.
4. You will be asked for your Password to verify

5. Enter your Password.
6. Select Authenticate.
7. The Supervisory Officer, or Principal (for Vice Principal) will replicate the process in order to complete

Summative Reports

1. Superintendents/Principals author these to be signed first by themselves, then get the signatures of those they appraised...(similar to TPA)
2. When the document is complete. Check the box at the bottom of the form

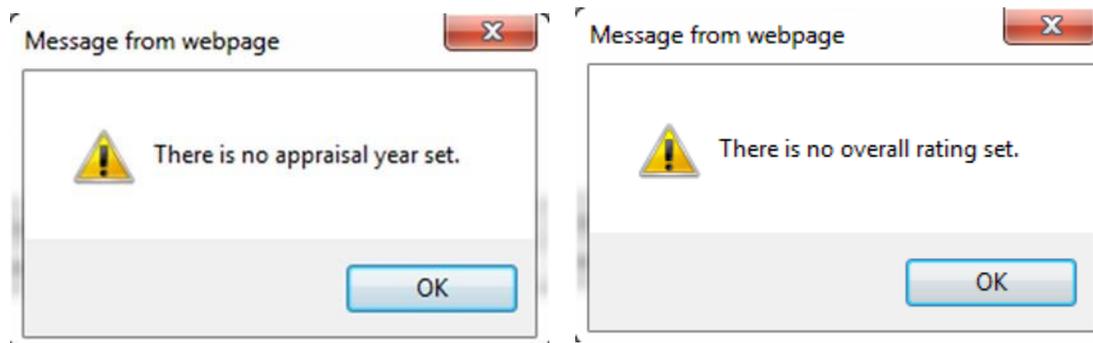


The screenshot shows a web form with two main sections: "Overall Rating" and "Authorization".

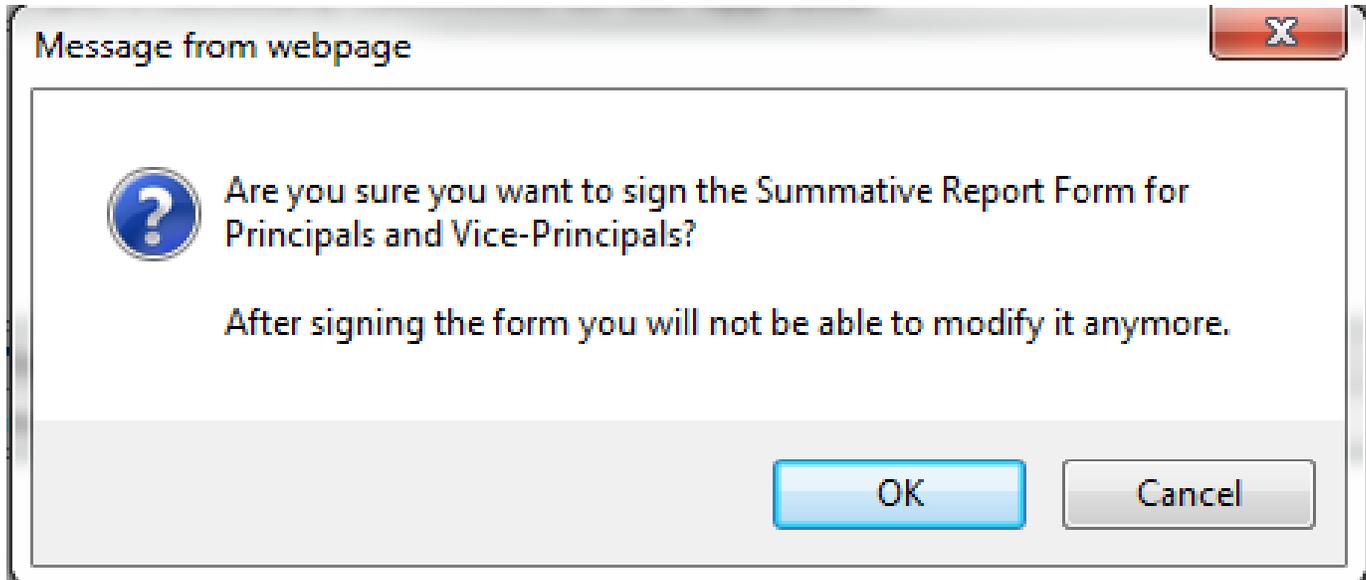
Overall Rating
Check the appropriate button:
 Satisfactory performance Unsatisfactory performance

Authorization
Supervisory Officer/Principal Name:
 Checking this box indicates that a summative report was conducted.
Principal/Vice-Principal Name:
 Checking this box indicates the receipt of this Summative Report.

3. You may receive messages to check you have completed all required fields. **The appraisal year must be set, and an overall rating of Satisfactory or Unsatisfactory must be checked.**



4. When all fields are complete you will receive a final message.



5. You will be asked for your Password to verify.

6. Enter your Password.

7. Select Authenticate.

8. When complete, the Principal and Vice-Principal will access the form to complete the process.

A screenshot of a password verification dialog box. It has a blue border. The text "Username: amigo" is displayed. Below it, the text "Password:" is followed by an empty text input field. At the bottom, there are two buttons: "Cancel" on the left and "Authenticate" on the right.