Goal Setting Process for Teachers



## 1.0 SCOPE

1.1 This work procedure describes the Goal Setting process for teachers.

#### 2.0 RESPONSIBILITY

- 2.1 Teachers and administrators are responsible for working collaboratively to establish the teacher's goals for each school year.
- 2.2 While there may be preliminary discussions between the teacher and the administrator regarding the goal setting process, the teacher will be responsible for initiating the goal setting process by entering their goals into the PeopleSoft ePerformance system.
- 2.3 The administrator will be responsible for reviewing and approving the goals entered into the PeopleSoft ePerformance system and, after making any agreed upon changes with the teacher, for "completing" the goals in the system.

#### **3.0 APPROVAL AUTHORITY**

3.1 Administrators are responsible for approving and completing the goal setting process for each teacher in the PeopleSoft ePerformance system.

#### **4.0 DEFINITIONS**

- 4.1 **ePerformance:** the PeopleSoft module used to complete and manage all District personnel evaluations beginning with the 2011-2012 school year.
- 4.2 **Performance document:** PeopleSoft performance management documents, such as an employee's Evaluation or Formal Observation document. Beginning with the 2012-2013 school year, the Goal Setting process has been integrated into the performance document.
- 4.3 **Performance Goal:** a measurable, desired result to be achieved in a specified time period that is agreed upon between the teacher/employee and their principal/manager.

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## **5.0 PROCEDURE**

5.1 Log in to PeopleSoft. This example shows the PeopleSoft Portal page as the starting point as there are numerous ways to access the PeopleSoft Portal (e.g. from SharePoint, directly from a web browser window, etc.). The PeopleSoft Portal page is shown below. *Note:* your home page is likely to be different from anyone else's home page, but the common PeopleSoft functionality should be visible. Specifically, you should see the *Human Resources* tab next to the *My Page* tab and Employee Self Service on your Enterprise Menu.

Welcome! Barney Every child is a work	Rubble of art. Create a masterpiece.	Thu, Mar 8, 12 Home	! Add to My Links	<u>Sian out</u>
My Page Human Resources Financials Personalize Content Layout	Search:	<b>&gt;</b>	My Links Sele	ect One: 💽
Enterprise Menu	Main Menu         Image: Committee Control           Define or maritain budgets, budget-check, and review budgets and exceptions.         Review Budget Activities           Customer Contracts         Access customer contracts.           M Access customer contracts.         M Access customer contracts.	Enterprise Portal News 2011 W-2 is available online The 2011 W-2 is now available of 403(b) 457 Plans 403(b) 457 Plans Universal Avail Allowable Contribution Limits Fil View All Articles and Sections	nline for viewing and p lability Notice Plus 201 nal	2 Maximum
b Workist D Reporting Tools - Change My Password - My Personalizations - My Dictionary	eProcurement Set up eProcurement, manage or approve eProcurement requisitions or POs.     Create Requisition     Manage Requisition     Receive terms			

5.2 Click on the **Human Resources** tab. A page similar to the following will be displayed.

OCHESTA	Welcome!	Ban	ney Rubble
	Every chi	ld is a work	of art. Creat
My Page Humar	n Resources <u>Financials</u>		
Personalize <u>Conte</u>	nt Layout		
Human Resource	es Menu	ø -	Employee Leave Si
Access Human on PeopleToo	ources 9.1 an Resources Management Syste Is 8.5x.	em 9.1 Maintenance Pack 1	Leave Balances Absence Sick
Employee Sel Employee Sel Information, P and Developm RCSD PAR Employee	ielf Service f Service transactions; includes 'ayroll and Compensation, Benefi nent, and employee Recruiting Ar <u>Review</u> <u>Home</u>	Time Reporting, Personal ts, Stock Activity, Training ctivities.	Vacation Personal Human Resources I

5.3 Click on the **Human Resources 9.1** link. Your PeopleSoft Human Resources Main Menu will appear (see next page).

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ORACLE	
Favorites Main Menu	
Menu	¢ -
Search:	
○	
▷ Self Service	
D Manager Self Service	
▷ Recruiting	
▷ Benefits	
Workforce Development	
D Set Up HRMS	
D Enterprise Components	
Change My Reserverd	
- My Personalizations	
- My Dictionary	
- My Portal Home	

5.4 Click on the Self Service link. A page similar to the following will appear.

ORACLE		Home   Add to Favorites   Sian out
Favorites Main Menu > Self Service		
Self Service		
Self Service		
Navigate to your self service information and activities.		
Review Transactions Review transactions that you submitted for approval	Time Reporting Report and review your time, schedules, request absences and more.	Payroll and Compensation Review your pay and compensation history. Update your direct deposit and other deduction or contribution information.
Review heath, insurance, savings, pension or other benefits information. Review and update dependent and beneficiary personal information. Benefits Information Benefits Summary Iminutance Summary	View and maintain learning records and objectives, and browse and search the learning catalog.	Performance Management     Access your performance and evelopment documents, and evaluations     you have done for others.     Mr Performance Documents     Other's Performance Documents
Recruiting Activities Recruiting Activities Careers	Anace Delegation Delegate authority for self-service transactions, and review and revoke delegation requests	

5.5 Locate and click on the **My Performance Documents** link (under the **Performance Management** section). The *My Performance Documents* menu will appear as shown below.

ORACLE	
Favorites Main Menu > Self Service	
Self Service	
💋 My Performance Documents	
Create, update, or view your performance documents.	
Current Documents Update or view your performance documents for the current period.	Historical Documents View your completed performance documents.

5.6 Click on the **Current Documents** link.

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ORAC	ILE'					
Favorites M	ain Menu > Self	Service >	Performance	Management > My Pe	erformance Documents	> Current Documents
Perform	nance Docu	iments				
Barney Rub Listed below	ble v are your current p	erformance d	ocuments.			
Your Docur	nents				Customize   Find   🖪	First 🚺 1-2 of 2 🖸 Last
Employee ID	Document Type	Begin Date	End Date	Job Title	Status	Manager
1824570	RTA 2012-2013	09/02/2012	06/29/2013	Tchr-Elem 4-6	In Progress	Mister Slate

5.7 Click on the <u>RTA 2012-2013</u> link in the *Document Type* column next to the performance document to be reviewed. Note: the RTA link is specifically for teacher evaluations. The name of the link will be different for other District personnel (e.g. <u>RAP</u>, <u>Civil Service</u>, <u>ASAR</u> Certificated, etc.). The performance document will appear as shown below.

avorites Main Menu	> Self Service	>	Performance	anagement >	My Perf	ormance Documents
Performance Do	cuments					
ocument D	etails					
arney Rubble, Tc TA 2012-2013: 0 Performance Docu	hr-Elem 4-6 9/02/2012 - 06/ ment Details	29/	2013			
Employee:	Barney Rubble	9	Job	Title:	Tchr-Eler	n 4-6
Document Type:	RTA 2012-2013	3	Per	iod:	09/02/20	12 - 06/29/2013
Template:	RTA Teachsca	pe 2	2011_Admin Doc	ument ID:	2829	
Manager:	Mister Slate		Sta	tus:	In Progre	SS
Document Progres	S					
Step			Status	Due Date	Action	Next Action
Set Goals		0	Not Started	06/29/2013		Start
		~		06/00/0040		

Return to Select Documents



5.8 Confirm that the *Template* information in the *Performance Document Details* section matches the template that you selected during the Teacher Evaluation Selection process at the beginning of the school year. Notify your manager if the incorrect template has been assigned to you. **Do not proceed with the Goal Setting process until the correct template has been assigned to you!** Note: if a selection was not made, the "RTA Teachscape 2011\_Admin Only" template was assigned for your evaluation. Also, some teachers did not participate in the teacher evaluation

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selection process because they have an evaluation template that is specific to their job responsibilities (e.g. School Psychologists, School Counselors, School Social Workers).

5.9 Select the <u>Start</u> link in the *Action* column for the *Set Goals* step. The *Performance Criteria* portion of the employee performance document will be displayed (top portion only is shown below).

ORACLE		
Favorites Main Menu > Self Service	> Performance Management > My Performance Documents	> Current Documents
Performance Document - RTA	2012-2013	
Performance Criteria		
Barney Rubble, Tchr-Elem 4-6		
RTA 2012-2013: 09/02/2012 - 06/29/201	13	
Save	Return to Document Detail	
Expand All Collapse	All Expand Sections	
Professional Development In	centive	
Click on the link below to select to view Development Incentive.	the employee's participation choice in PDI- Professional	

RCSD Professional Development Incentive Link

5.10 Click on the <u>RCSD Professional Development Incentive Link</u>. The following page will be displayed.

Professional Development Incentive

These g	joals will ser	ve as my profess	ional learning goals for the year
and I pla	an to take pa	rt in the Professi	ional Development Incentive.
No officia	I RCSD/RTA en	rollment form is requir	red.
Pr	ofessional Dev	elopment Incentive Su	ummary
	C No	C Yes	
l certify f	that I teach i	n a TIF school.	
TI	F School		
	C No	C Yes	
My intent hours.	t is to compl	ete TIF professio	nal hours in addition to the PDI
TIF	Professional ho	ours and PDI hours	
	C No	C Yes	
	(	Save	Return

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Thes and I No of	e goals will serv plan to take par ficial RCSD/RTA enro	ve as my professional t in the Professional ollment form is required.	I learning goals for the year Development Incentive.
	Professional Deve	lopment Incentive Summa	ary
	C No	⊙ Yes	

5.11 In the *Professional Development Incentive Summary* section, click on the **Yes** radio button if you plan to take part in the Professional Development Incentive (PDI) for the current school year or the **No** radio button if you do not wish to take part in the Professional Development Incentive this year.

l certi	ify that I teach i	in a TIF school.
	TIF School	
	C No	© Yes

5.12 If you intend to complete Teacher Incentive Fund (TIF) professional hours, you must first certify that you teach in a TIF school by clicking on the **Yes** radio button in the *TIF School* section. If you do not teach in a TIF school, click on the **No** radio button.

- 5.13 If you intend to complete TIF professional hours in addition to your PDI hours, you must teach in a TIF school (as certified in the prior section) **and** click on the **Yes** radio button in the *TIF Professional Hours and PDI Hours* section. If you do not teach in a TIF school or you do not intend to complete TIF professional hours, click on the **No** radio button.
- 5.14 In the example shown above, the teacher is planning to participate in the Professional Development Incentive. Even though the teacher participates in a TIF school, they have elected not to complete the additional Teacher Incentive Fund professional hours.
- 5.15 Click on the **SAVE** button once your PDI and TIF selections have been made.
- 5.16 Click on the **RETURN** button and you will be returned to the *Performance Criteria* section of your performance document. Note: you will be able to change your Professional Development Incentive and/or Teacher Incentive Fund selections up until the time the Goal Setting process has been completed (in the system) by your administrator.

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5.17 The section immediately below the *Professional Development Incentive* section is the Goal Setting section for Domain 1 – Planning and Preparation and is shown below.

After reviewing the rubric in the Teacher Evaluation Guide, determine the area/areas that will enhance your practice and that will guide your professional learning for the year. Per your goal setting meeting with your Administrator, a goal may be added to this section.

Link to Rubric

Add Goal Setting: Domain 1 - Planning & Preparation

5.18 As you begin thinking about your goals for the coming school year, you may want to reference the Teachscape rubric. For your convenience, a link to the rubric has been provided. Click on the Link to Rubric link if you wish to use this reference. It will open in a separate window, which you can simply close when done referring to the rubric.

The system requires that a minimum of one goal be entered, which could be for any one of the domains. The system will also allow multiple goals to be entered for a given domain, if desired. *Be sure to collaborate with your administrator for their guidance on the Goal Setting Process.* 

5.19 Click on the <u>Add Goal Setting: Domain 1 – Planning & Preparation</u> link to enter your goals, if any, for Domain 1. The following page will appear:

ORACLE	
Favorites Main Me	nu > Self Service > Performance Management > My Performance Documents > Current Documents
Performance I	Document - RTA 2012-2013
*Title:	
Description:	ب ب
Update	Return to Performance Criteria

- 5.20 Enter a short title, or descriptor, for the first goal. This should be a meaningful descriptor as it will always be visible in the goal setting section of the performance document (even when all sections have been "collapsed").
- 5.21 Enter the full description of the goal in the *Description* box. A sample is shown below.

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#### Performance Document - RTA 2012-2013 Add Goal Setting: Domain 1 - Planning & Preparation

*Title:	Improve Student Assessments	
Description:	Ensure that the student assessments are aligned properly with instructional outcomes and are adapted, as necessary, for individual studnts.	_&
Update	Return to Performance Criteria	

5.22 Click on the spell check  $\overset{\checkmark}{=}$  icon in the upper right corner of the *Description* box to check the spelling for this goal. Note: It is recommended that you use the spell check feature so that your goal setting document is completed with no mis-spelled words.

ORACLE
Favorites Main Menu > Self Service > Performance Management > My Performance Documents > Current Documents
Spell Check
Field Label:       Long Description         Spell Check Text:       Ensure that the student assessments are aligned properly with instructional outcomes and are adapted, as necessary, for individual students.
Change To: Students
Alternatives: students stunts
Ignore All Change Change All Add
OK Cancel

- 5.22.1 Note that the intended word, "students", has been misspelled in the goal description and that the system recommended option is "students".
- 5.22.2 Select the **Ignore, Ignore All, Change, Change All,** or **Add** button as appropriate. In this example, we will click the **Change** button. The other buttons function as follows:
  - 5.22.2.1 Ignore will ignore a single instance of the misspelled word.
  - 5.22.2.2 Ignore All will ignore all instances of the misspelled word (if it occurs more than once).

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- 5.22.2.3 Change will change a single instance of the misspelled word.
- 5.22.2.4 Change All will change all instances of the misspelled word (if it occurs more than once).
- 5.22.2.5 Clicking the **Add** button will add this word to your personal dictionary for future spell checks. This may be appropriate if there is specific terminology or acronyms that are used in your area of expertise.
- 5.22.3 If more than one alternative is provided by the system, as shown in the example above, select the desired alternative and then click on the **Change** button.
- 5.22.4 Repeat the above process for each misspelled word until all spelling errors in the goal description have been corrected.

ORACLE
Favorites Main Menu > Self Service > Performance Management > My Performance Documents > Current Documents
Spell Check
Field Label: Long Description
Spell Check Text: Ensure that the student assessments are aligned properly with instructional outcomes and are adapted, as necessary, for individual students.
The spelling check is complete.

OK Cancel

5.22.5 Click on the **OK** button once the spell check is complete and all spelling errors have been corrected.

ORACLE <sup>.</sup>	
Favorites Main Menu >	Self Service > Performance Management > My Performance Documents > Current Document
Performance Docu Add Goal Setti	ment - RTA 2012-2013 ng: Domain 1 - Planning & Preparation
*Title:	Improve Student Assessments
Description:	Ensure that the student assessments are aligned properly with instructional outcomes and are adapted, as necessary, for individual students.
Update <u>Ret</u>	Irn to Performance Criteria

5.22.6 Click the **Update** button to update the corrected goal with the spelling changes just made and return to the Goal Setting page.

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$\nabla$	Goal	Setting:	Domain	1	- Planning	&	Preparation
_							

After reviewing the enhance your pra- setting meeting w	e rubric in the Teach ctice and that will gu ith your Administrate	er Evaluation Guide, determine the area/areas that ide your professional learning for the year. Per yo or, a goal may be added to this section.	at will our goal		
Link to Rubric					
Expand	<u>Collapse</u>				
📼 Improve Stude	ent Assessments				
Description : E instructional ou students.	nsure that the stude tcomes and are ad	nt assessments are aligned properly with apted, as necessary, for individual	<u>//</u>	Î	
Created By:	Barnev Rubble	09/14/2012 2:38PM			

- + Add Goal Setting: Domain 1 Planning & Preparation
- 5.22.7 The Goal Setting page is displayed, as shown above, and reflects the spell-checked goal. At this time, you can enter additional goals for Domain 1 if desired. Click on the <u>Add Goal Setting: Domain 1 Planning & Preparation</u> link if you wish to add additional goals for Domain 1 and follow the steps described above, beginning with section 5.15, to complete te entry of your goals for Domain 1.
- 5.23 Enter your goal(s), if any, for Domain 2 by clicking on the <u>Add Goal Setting: Domain 2 –</u> <u>Classroom Environment</u> link. Follow the same steps as described above, beginning with section 5.15, to complete the entry of your goals for Domain 2.
- 5.24 Enter your goal(s), if any, for Domain 3 by clicking on the <u>Add Goal Setting: Domain 3 –</u> <u>Instruction</u> link. Follow the same steps as described above, beginning with section 5.15, to complete the entry of your goals for Domain 3.
- 5.25 Enter your goal(s), if any, for Domain 4 by clicking on the <u>Add Goal Setting: Dom 4 –</u> <u>Professional Responsibilities</u> link. Follow the same steps as described above, beginning with section 5.15, to complete the entry of your goals for Domain 4.

After reviewing the rubric in the Teacher Evaluation Guide, determine the area/areas that will enhance your practice and that will guide your professional learning for the year. Per your goal setting meeting with your Administrator, a goal may be added to this section.				
Link to Rubric				
Add Goal Setting: Dom 4-Professional Responsibilities				
▶ Audit History				
Save	<b>a</b> E	Return to Document Detail		

5.26 Click the **Save** button to save the goals you have entered. The Save button can be checked at any time during the entry of your goals. It is highly recommended that you click the save button periodically so that your work is not lost. Note that the system inactivity time-out is currently 2 hours. Any work entered, but not saved, prior to an inactivity time-out will be lost.

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ORACLE							
Favorites Main Menu > Self Service > P	erformance	Management	>	My Performance Docum	ents	>	Current Documer
Performance Document - RTA 2012	-2013						
Performance Criteria							
Barney Rubble, Tchr-Elem 4-6 RTA 2012-2013: 09/02/2012 - 06/29/2013							
🗹 You have successfully saved your goals							
					_		
Save	in 🔁 🛃	Return to Do	cum	ient Detail			

- 5.27 Upon saving, you will be returned to the top of the Performance Document where you can see the confirmation message that your goals have been successfully saved.
- 5.28 Once you are satisfied with the goals you have entered, inform your Administrator that you are ready to discuss your specific goals for the coming year. Your Administrator will then be able to complete their portion of the Goal Setting Process in the system.

**Note:** Either you or your administrator will be able to make any mutually-agreeable changes to your goals **prior to** your administrator "Completing" their portion of the Goal Setting process in the system.



5.29 If you have additional tasks to perform in PeopleSoft, such as Time Entry or View Paycheck, click on the **Main Menu** drop-down from the "breadcrumbs" (shown above) and select the desired system function.



- 5.30 If you have no additional tasks to perform in PeopleSoft, click on the **Sign out** link in the upper right hand corner of your window.
- 5.31 **Congratulations!** You have completed the Teacher portion of the goal setting process.

### 6.0 ASSOCIATED DOCUMENTS

6.1 None.

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# 7.0 RECORD RETENTION

Identification	Storage	Retention	Disposition	Protection
PeopleSoft	SharePoint	Until Superceded		N/A
ePerformance initial	ePerformance project			
implementation.	site. Displayed on			
	EngageRochester site.			

## **8.0 REVISION HISTORY**

Date:	Rev.	Description of Revision:
9/25/12	Original	Original Document

\*\*\*End of Procedure\*\*\*