

2024-2025 SCHOOL COUNSELOR APPRAISAL INSTRUMENT (SCAI) GUIDEBOOK

In 2016, Dallas Independent School District’s Board of Trustees adopted District goals that prioritize measurable improvement of student outcomes. While this work will rely heavily on the dedication and performance of the District’s instructional leaders and staff, **counselors play a crucial role in reaching these goals by supporting the work of our teachers and school leaders and working directly with students, families, and the community to further our mission of “Educating all students for success.”**

To advance student achievement in Dallas ISD, each of the District’s 20,000 employees must be working toward a shared vision, focusing on the same outcomes, and striving for excellence. The School Counselor Appraisal Instrument (SCAI) is designed to grow Dallas ISD counselors toward the exemplary performance that our students deserve. SCAI is the approved appraisal instrument for campus administrators to complete counselors’ annual performance appraisal, as dictated per district board policy.

EFFECTIVE IMPLEMENTATION

The primary intent of the SCAI appraisal process is to provide a framework for accurate and rigorous assessment of counselor performance followed by honest and open dialogue about strengths and areas for growth.

APPRAISAL PROCESS

The appraisal process contained in the SCAI Guidebook is accomplished through three conferences during the annual appraisal period:

- Phase 1: Planning for Success and Goal-Setting Conference
- Phase 2: Mid-year Conference – Review Status of Counseling Program
- Phase 3: Final SCAI Evaluation Conference

All counselors will have electronic access to their appraisal/evaluation, participate in a performance conference with their appraiser, and will have the opportunity to respond to the appraisal results.

The appraisal planning conference, mid-year review, and end of year review processes contained in the performance module occur during three phases, respectively, within the annual appraisal period.

PHASE 1: PLANNING FOR SUCCESS AND GOAL-SETTING CONFERENCE

In preparation for this planning/goal setting conference, the counselor is accountable for the development and accomplishment of 2-3 annual individual professional goals that align with campus and district needs. During the planning/goal setting conference, the administrator ensures that the counselor understands their job roles/responsibilities, goals, and expected professional standards of conduct and ensures that the counselor’s goals are aligned with the goals of their campus and the counseling program. The required documentation binder should also be reviewed.

This planning activity is critical for the success of the campus, counseling program, and the district. When this activity is well executed by all appraisers and counselors, counselors can focus their time and resources in meeting the priorities of their campuses, the counseling program, and the district.

PHASE 2: MID-YEAR CONFERENCE – REVIEW STATUS OF COUNSELING PROGRAM

During the mid-year review conference, counselors complete a self-rating task in Cornerstone prior to the conference. Appraisers will record notes regarding the conference in the notes section of the task as they review the counselor’s self-rating form. The Principal and Counselor Agreement is reviewed and revised, if necessary. Progress of calendar activities and the required documentation binder are reviewed according to the midyear checklist. Counselors are provided specific and general feedback to assess areas of strength and growth, including where their performance falls at the mid-year point.

Expectations for second semester counseling activities are reviewed. If necessary, an Individual Intervention Plan (IIP) will be developed to address levels of performance that are not meeting expectations. The mid-year conference includes the following activities:

1. A discussion and review of the counselor’s performance,
2. Review of performance components where counselor’s work performance and goals are inconsistent with their progress,
3. Review, revision, and realignment of the counselor’s goals with the needs and goals of the district, the counseling program, and campus, and
4. Development of an IIP whenever counselor performance requires improvement (if applicable).

For the mid-year conference, counselors should bring documentation supporting their work performance. As a best practice, appraisers should not wait until the end of year review conference to develop an IIP. Appraisers may conduct additional conferences between the mid-year conference and end of year conference if a counselor’s work performance requires improvement.

PHASE 3: FINAL SCAI EVALUATION CONFERENCE

During the end of year review conference, the appraiser conducts a final review and discussion of progress made toward meeting the counselor’s performance goals. The appraisers reviews and documents areas of commendation/growth and provides the final annual overall rating results. The End of year review conference requires the following:

1. Appraiser will review the counselor’s success in meeting their goals and expected work behaviors, Appraisers will provide the counselor with their final performance component ratings and overall performance ratings,
2. Appraisers will review performance components for improvement and commendation.

APPRAISAL TIMELINE

PHASE	APPRAISAL CYCLE COMPONENT	TIMELINE FOR COMPLETION	KEY ACTIONS
Phase 1: Goal Setting	Online Goal Entry	August 26- October 18, 2024	<ul style="list-style-type: none"> • Counselor enters 2-3 SMART goals online in the Career Management System platform. Appraiser reviews goal(s).
	Planning/Goal Setting Conference		<ul style="list-style-type: none"> • Appraiser holds goal-setting conversation around job responsibilities, the SCAI rubric, and reviews counselor’s goals.
Phase 2: Mid-Year Review	Online Employee Self-Review	January 21- February 28, 2025	<ul style="list-style-type: none"> • Counselor track goal completion. • Counselor self-rates performance on identified indicators and goal accomplishment
	Mid-Year Review Conference		<ul style="list-style-type: none"> • Counselor and appraiser discuss progress and areas of improvement • If needed, appraiser redefines goals or develops intervention plan if progress is below expectations • Appraiser completes online conference acknowledgment
Phase 3: End of Year Review	Online Appraiser Review	May 5- June 20, 2025	<ul style="list-style-type: none"> • Appraiser completes review of counselor’s performance on SCAI rubric and goal accomplishment
	End of Year Review Conference		<ul style="list-style-type: none"> • Appraiser examines goals and scores competencies • Appraiser holds end of year review conference with employee • Employee accepts evaluation online during the end of year conference

*Dates are subject to change.

APPRAISAL COMPONENTS



INDIVIDUAL PERFORMANCE <i>75% of Evaluation Score</i>	Domains & Indicators	Elementary Total Points*	Secondary Total Points*
	Individual Student Planning (Appraisal and Advisement) (Indicators 1.1, 1.2, & 1.3)	15%	23%
	Responsive Services (Counseling) (Indicator 2.1)	22%	22%
	Guidance Curriculum (Instruction) (Indicators 3.1 & 3.2)	15%	15%
	System Support, Program Management, and Professionalism (Indirect Services) (Indicators 4.1, 4.2, & 4.3)	23%	15%

*Revised in April 2019 to reflect 75% of overall evaluation score

INDIVIDUAL PROFESSIONAL GOALS <i>25% of Evaluation Score</i>	2 - 3 SMART Goals
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SCAI RUBRIC DOMAINS, STANDARDS, AND INDICATORS

<p>DOMAIN 1: Direct Services - Individual Student Planning (Appraisal and Advisement)</p>	<p>DOMAIN 2: Direct Services - Responsive Services (Counseling)</p>	<p>DOMAIN 3: Direct Services - Guidance Curriculum (Instruction)</p>	<p>DOMAIN 4: Indirect Services - System Support</p>	<p>DOMAIN 4: Indirect Services - Program Management and Professionalism</p>
<p>Standard: Plans and delivers individualized services to students and parents/guardians aligned to developmentally appropriate academic and college/career goals</p>	<p>Standard: Provides needs-based referral information, consultation, and individual and small group counseling to students, parents/guardians, and school personnel to support student success</p>	<p>Standard: Plans and delivers a portfolio of guidance lessons and learning activities aligned to developmentally appropriate social-emotional goals and campus needs</p>	<p>Standard: Leads, advocates, and/or collaborates on school-wide initiatives and programs to support equity, inclusivity, respect, and safety for students</p>	<p>Standard: Engages in ongoing professional learning, educates stakeholders, and promotes the importance of counseling while adhering to all compliance mandates</p>
<p>Indicator 1.1: Provides evidence-based academic achievement support and guidance for students and parents/guardians</p> <p>Indicator 1.2: Assists students in transition activities to ensure access to appropriate academic programs</p> <p>Indicator 1.3: Facilitates a school-wide college/career/military program aligned with district goals and The College Board's <i>Eight Components of College and Career Readiness Counseling</i></p> <p>Additional activities outlined in the Individual Student Planning (ISP) section of the SCAI guidebook</p>	<p>Indicator 2.1: Provides individual and small group counseling to meet students' social, emotional, and interpersonal needs</p> <p>Additional activities outlined in the Responsive Services (RS) section of the SCAI guidebook</p>	<p>Indicator 3.1: Provides structured and engaging classroom guidance lessons related to healthy student development</p> <p>Indicator 3.2: Implements schoolwide prevention activities to support students' physical, emotional, and academic development</p> <p>Additional activities outlined in the Guidance Curriculum (GC) section of the SCAI guidebook</p>	<p>Indicator 4.1: Develops and implements an evidence-based counseling program</p> <p>Additional activities outlined in the System Support (SS) section of the SCAI guidebook</p>	<p>Indicator 4.2: Exhibits a commitment to continual professional growth and development</p> <p>Indicator 4.3: Maintains standards of professionalism</p>

SCORING PERFORMANCE RUBRIC INDICATORS

When evaluating performance, SCAI rubric indicators will be scored using the following 1-4 scale during the end of year appraisal using the performance levels indicated in the full SCAI Performance Rubric.

INDIVIDUAL GOAL SETTING

Each counselor evaluated on the SCAI will be required to have 2-3 goals entered into the system. Goals should be rigorous yet attainable to challenge employees while allowing them to grow and develop professionally. This goal must meet the SMART goal criteria and be entered in the Cornerstone online system. More information about goal development can be found online at the SCAI website.

SCORING GOAL ACCOMPLISHMENT

When scoring the accomplishment of goals, the following 1-4 scale will be used:

SCORE	RATING	DESCRIPTION
1	Made Insufficient or No Progress	<i>Counselor failed to set rigorous and relevant goals or did not take sufficient action to accomplish goals or targets.</i>
2	Made Some Progress	<i>Counselor made some progress toward achieving goals, but did not achieve goals in the specified timeframe and/or lacks supporting evidence.</i>
3	Made Significant Progress	<i>Counselor made significant progress toward achieving rigorous and relevant goals but did not achieve them in the timeframe specified or lacks some supporting evidence.</i>
4	Achieved Goals	<i>Counselor accomplished all rigorous and relevant goals in the timeframe specified and can support goal accomplishment with supporting evidence.</i>

OVERALL EVALUATION RATING

Overall evaluation scores for the 2021-2022 evaluation cycle will be determined by combining scores for the SCAI Rubric indicators (75%) with the score for individual goal accomplishment (25%).

The indicators for each competency will be averaged together to produce a score for each domain. These domain scores will then be added to determine the overall SCAI Rubric score. The score for each individual/team goal will be averaged together to determine an overall employee score for Individual Goal Accomplishment. **The scores for SCAI Rubric and Individual Goal Accomplishment will be combined based on the 75/25 weighting to determine the overall evaluation score, and will be categorized according to the ranges identified below:**

OVERALL RATING	SCORE RANGE
Unsatisfactory	0.00-2.0
Proficient/Meets Expectations	2.1-3.49
Exceeds Expectations	3.5-3.8
Exemplary	3.9-4.0

PERFORMANCE DOCUMENTATION

Counselors may prepare and present documentation supporting their performance. This supporting documentation may include information such as the required documentation binder, counseling program calendar, action plans, and completed products and documentation of services (reports/data, report numbers/metrics, memos, meeting agendas and/or minutes, teacher/student satisfaction survey results, or records of services). This supporting documentation must be organized within each of the following components: competencies and goals.

INDIVIDUAL INTERVENTION PLAN (IIP)

An appraiser must develop an Individual Intervention Plan (IIP) for a counselor whose performance has been determined to require improvement. The IIP template is available from Counseling Services and appropriate documentation and evidence for need should be included.

As a best practice, an IIP should be developed in collaboration with the counselor. In all cases, the appraiser and the counselor must meet and review the Individual Intervention Plan. The IIP must be implemented and completed during the scheduled work days and within the annual appraisal year.

The IIP consists of the following:

- Performance component(s) in which the counselor is in need of assistance,
- Specific professional development activities and dates for completion,
- Evidence to determine that professional development activities have been completed,
- Directives for needed changes in counselor behavior and timelines for accomplishing change, and
- Evidence to determine if counselor performance or behavior has changed.

If necessary, the appraiser may develop an IIP at any time during the annual appraisal cycle to call attention to performance components requiring improvement.

Note: Appraisers will provide counselors with corrective feedback on existing intervention plans and discuss intervention plans for the subsequent appraisal period if necessary.

EXTENUATING CIRCUMSTANCES

Extenuating circumstances may prevent appraisers from providing an end of year review rating based on a counselor's performance components. These circumstances include the following:

1. The counselor has been in current position six months or less (at the time of the end of year review),
2. The counselor is on administrative leave, or
3. The counselor has not been in attendance due to an approved leave.

Selecting an N/A Rating: When rating performance components, the appraiser can select the rating "N/A" to designate one of the aforementioned extenuating circumstances. The rating will not be calculated in the Overall Rating, but the appraiser will be able to complete an appraisal for the counselor.

GRIEVANCE PROCESS

Counselors are encouraged to discuss their concerns and grievances with their appraiser, principal, or other appropriate administrator. When informal discussions fail to resolve the concern or dispute, the counselor may file a grievance with the Employee Relations Department. See DGBA at <http://pol.tasb.org/Policy/Code/361?filter=DGBA>.



A grievance form must be filed no later than ten (10) business days from the date the counselor first knew or, with reasonable diligence, should have known of the decision or action giving rise to the grievance or complaint. Please contact Employee Relations for additional information or clarification.

CONTACT

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