

UPPER MERION AREA SCHOOL DISTRICT

MANAGEMENT COMPENSATION PLAN

July 1, 2018 – June 30, 2021

Approved by Board of School Directors

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**UPPER MERION AREA SCHOOL DISTRICT
Management Compensation Plan
July 1, 2018 – June 30, 2021**

THIS MANAGEMENT COMPENSATION PLAN IS ADOPTED BY THE BOARD OF SCHOOL DIRECTORS THIS 1ST DAY OF June, 2018, FOLLOWING MEET AND DISCUSS SESSIONS BETWEEN THE BOARD OF SCHOOL DIRECTORS AND REPRESENTATIVES SELECTED BY THE MANAGEMENT TEAM.

I. PHILOSOPHY

The Upper Merion Area School District Management Compensation Plan is based on the philosophy that management duties and responsibilities are different from other employees' and unique in many respects. Accordingly, their compensation plan should be different and unique. This plan's intent is to provide compensation for Upper Merion Area School District Managers which is internally fair and consistent, and externally competitive in the four-county suburban Philadelphia area.

II. TERM OF MANAGEMENT COMPENSATION PLAN

This Plan is effective July 1, 2018 and shall continue until June 30, 2021.

III. MANAGEMENT POSITIONS

A. Management Positions/Assignments (Managers)

Assistant Director of Technology
Assistant Principal, High School
Assistant Principal, Middle School
Director of Athletics and Student Activities
Director of Curriculum and Instruction
Director of Curriculum and Instruction – STEM
Director of Operations
Director of Student Services
Director of Technology
Principal, Elementary School
Principal, High School
Principal, Middle School
Purchasing Agent
Supervisor of Food Services
Supervisor of Special Education
Supervisor of Transportation

B. Temporary Management Positions/Assignments (Temporary Managers)

Certain Temporary Administrative positions which may be created by the Board (i.e., Temporary Managers) may fall within the framework of the management classification with consideration to the duties/responsibilities, credentials, experience and duration of the position/assignment. The determination as to whether or not a Temporary Manager falls within the framework of this Plan shall be left solely and exclusively to the determination of the Superintendent of Schools.

IV. COMPENSATION

A. Premise

The Upper Merion Area School District Board of Directors believes that our Managers, as leaders of the Upper Merion Area School District, should be both held accountable for and compensated for the well-being and growth of the district.

As a management team, our leaders acknowledge that working together they have greater strength and effectiveness than any one individual.

Our leaders acknowledge that to be most effective as a management team they must share their strengths with each other and seek out others to assist with their challenges.

Our ultimate goal is to inspire excellence in every student, every day. If successful in meeting that goal, we will assure students' academic success, and we will create for students a nurturing environment that challenges them, supports them, and enhances their lives. Regardless of individual areas of responsibility, the results of all of our efforts should flow toward meeting that goal.

B. Components

1. Evaluation Instrument

- a. Professional Employee Managers – Managers who are professional employees (currently, Assistant Principal High School, Assistant Principal Middle School, Director of Curriculum and Staff Development, Director of Curriculum and Staff Development-STEM, Director of Student Services, Principal Elementary School, Principal High School, Principal Middle School, and Supervisor of Special Education) shall be subject to the principal/school leader rating form (PDE 82-2) and the procedures established under Pennsylvania Department of Education regulations for the evaluation of principals/school leaders.
- b. Non-Professional Managers – Managers who are non-professional (currently, Assistant Director of Technology, Director of Athletics and Student Activities, Director of Operations, Director of Technology, Purchasing Agent, Supervisor of Food Services, and Supervisor of Transportation) shall be subject to the performance evaluation instrument attached as Exhibit “A” hereto, which shall be utilized to evaluate Managers during the term of this Plan.

2. Evaluation/Conference

Each Manager will be given an evaluation report and the opportunity to discuss the report. In the event a Manager will likely receive either a needs improvement or an unsatisfactory evaluation, the Manager's evaluator shall give the Manager at least twenty-four (24) hours' notice of the potential for

receiving such a rating. Under such circumstances, at the Manager’s annual evaluation, the Manager may request to have another member of the Manager’s group present as an observer to the conference. The Manager’s evaluator shall attempt to accommodate the schedule of the other observing Manager to the extent possible, but under no circumstances shall it be used as a method to ultimately delay the evaluation conference.

3. Evaluation Calendar

- July - Develop Goals
- August - Goals Conference
- January, February - Mid-year Review
- June 15 - Manager Self-Evaluation Due
- June 15 - July 15 - Evaluation Report
- July 15 - Establish Salary

C. Salary Ranges

<u>MANAGER</u>	<u>2018-2019 MINIMUM</u>	<u>2018-2019 MAXIMUM</u>
Director of Athletics & Student Activities	\$80,304	\$143,487
Director of Curriculum & Instruction	\$112, 189	\$185,279
Director of Curriculum & Instruction - STEM	\$112,189	\$185,279
Director of Operations	\$97,720	\$149,059
Director of Student Services	\$119,808	\$185,279
Director of Technology	\$88,765	\$199,210
High School Principal	\$107,277	\$203,389
Middle School Principal	\$111,041	\$199,210
Elementary Principal	\$76,440	\$181,100
Assistant Director of Technology	\$47,754	\$133,250
Middle School Assistant Principal	\$90,000	\$169,955
High School Assistant Principal	\$90,712	\$169,955
Supervisor of Food Services	\$72,000	\$122,591
Supervisor of Special Education	\$73,620	\$162,989
Supervisor of Transportation	\$58,251	\$122,591
Purchasing Agent	\$61,000	\$122,591

<u>MANAGER</u>	<u>2019-2020 MINIMUM</u>	<u>2019-2020 MAXIMUM</u>
Director of Athletics & Student Activities	\$80,304	\$147,047
Director of Curriculum & Instruction	\$112, 189	\$189,911
Director of Curriculum & Instruction - STEM	\$112,189	\$189,911
Director of Operations	\$97,720	\$152,785
Director of Student Services	\$119,808	\$189,911
Director of Technology	\$88,765	\$204,190
High School Principal	\$107,277	\$208,473
Middle School Principal	\$111,041	\$204,190
Elementary Principal	\$76,440	\$185,628
Assistant Director of Technology	\$47,754	\$136,581
Middle School Assistant Principal	\$90,000	\$174,204
High School Assistant Principal	\$90,712	\$174,204
Supervisor of Food Services	\$72,000	\$125,656
Supervisor of Special Education	\$73,620	\$167,064
Supervisor of Transportation	\$58,251	\$125,656
Purchasing Agent	\$61,000	\$125,656

<u>MANAGER</u>	<u>2020-2021 MINIMUM</u>	<u>2020-2021 MAXIMUM</u>
Director of Athletics & Student Activities	\$80,304	\$150,751
Director of Curriculum & Instruction	\$112, 189	\$194,659
Director of Curriculum & Instruction - STEM	\$112,189	\$194,659
Director of Operations	\$97,720	\$156,605
Director of Student Services	\$119,808	\$194,659
Director of Technology	\$88,765	\$209,295
High School Principal	\$107,277	\$213,685
Middle School Principal	\$111,041	\$209,295
Elementary Principal	\$76,440	\$190,268
Assistant Director of Technology	\$47,754	\$139,996

Middle School Assistant Principal	\$90,000	\$178,559
High School Assistant Principal	\$90,712	\$178,559
Supervisor of Food Services	\$72,000	\$128,797
Supervisor of Special Education	\$73,620	\$171,241
Supervisor of Transportation	\$58,251	\$128,797
Purchasing Agent	\$61,000	\$128,797

1. A salary program is designed with separate salary levels. The program structure provides a mechanism for relating the salary of each Manager to both the marketplace and to each other.
2. The minimum and maximum salaries for each salary level represent the available ranges of salaries to be paid for jobs assigned to those levels.
3. The salary structure is designed to reflect competitive salary levels for three school years. There needs to be an annual review and adjustment, if appropriate, to the salary structure in order to ensure that it remains competitive and provides adequate opportunity for upward salary movement.
4. An incoming Manager, new to the district, or moving from another professional position within the District, should be given a salary commensurate with his/her position, ability and background in relation to the Manager salary ranges.

Applicants for Manager positions without any directly related previous experience could be hired at the minimum salary for the Manager level in which they are placed.

D. Corridor Compensation

Notwithstanding the minimum salary ranges for Managers set forth in IV.C. of this Plan, individuals serving in the position of Assistant Principals, Director of Curriculum and Instruction, Supervisor of Special Education, Elementary Principal, Middle School Principal, or High School Principal will be subject to a corridor formula.

1. Rationale – In considering salary adjustments for Managers whose positions require a professional certificate issued by the Pennsylvania Department of Education, the District places high importance on the level of education obtained by each Manager, their responsibility within the organization, and how effectively they meet that responsibility. The District acknowledges the demand for educational leaders and values long-term relationships with those who lead the District.

2. Corridor Formula – Beginning with the fourth full year of employment as a Manager at the District, salaries of Managers who, following Years 1, 2, 3, and 4 received at least a satisfactory performance evaluation in each of the years in question, shall earn a base level compensation of at least equivalent to the highest salary of teachers with whom they hold the same level of education, as indicated in the salary schedule that is part of the Collective Bargaining Agreement between the District and the Upper Merion Area Education Association plus the following corridor amounts:

Position	Corridor Amount Added to Base Salary of Manager
Assistant Principals	\$5,000
Director of Curriculum and Instruction	\$5,000
Supervisor of Special Education	\$5,000
Elementary Principal	\$10,000
Middle School Principal	\$12,000
High School Principal	\$15,000

Salaries shall be incrementally adjusted during Years 2 and 3 towards the Year 4 final adjustment. These increments shall be recommended by the Superintendent to the Board of School Directors.

E. Salary Increases

Salary increases shall be provided pursuant to the schedule listed in the Management Compensation Plan Evaluation Guidelines (Exhibit “A”).

Salary increases shall be based on job performance evaluation as described in this plan. Salary increases shall be based on the actual salary of each Manager.

An individual Manager shall not receive any salary increase if his/her achievement is judged as needs improvement or unsatisfactory.

V. FRINGE BENEFITS

A. Medical Insurance

1. During the term of this Plan, the Board agrees to contract with:
 - (a) Independence Blue Cross/Blue Shield to provide Personal Choice Option 215 (Personal Choice 215 Plan).
 - (b) Keystone Health Plan East to provide Keystone Health Maintenance Organization C1-F1 (“HMO C1-F1 Plan”).
 - (c) Independence Blue Cross/Blue Shield to provide Keystone Direct C1-F1-O1 Point of Service (Point of Service Plan).

- (d) Independence Blue Cross/Blue Shield to provide Keystone Direct C2-F1-O1 Point of Service (Point of Service Plan).
2. During the term of this Plan, the Board agrees to pay the following amounts toward the premium cost of the Health Benefit Plans for Manager's and their eligible dependents selecting coverage thereunder:
- (a) The Board shall pay one hundred percent (100%) of the premium cost of the Personal Choice 215 Plan less monthly mandatory payroll deductions of sixteen percent (16%) of the District's monthly premium cost per month in plan year 2018-19; eighteen percent (18%) of the District's monthly premium cost per month in plan year 2019-20; and twenty percent (20%) of the District's monthly premium cost per month in plan year 2020-21.
 - (b) The Board shall pay one hundred percent (100%) of the premium cost of the HMO C1-F1 Plan less monthly mandatory payroll deductions of fourteen percent (14%) of the District's monthly premium cost per month in plan year 2018-19; sixteen percent (16%) of the District's monthly premium cost per month in plan year 2019-20; and eighteen percent (18%) of the District's monthly premium cost per month in plan year 2020-21.
 - (c) The Board shall pay one hundred percent (100%) of the premium cost of the POS C1-F1-O1 Plan less monthly mandatory payroll deductions of nine percent (9%) of the District's monthly premium cost per month in plan year 2018-19; ten percent (10%) of the District's monthly premium cost per month in plan year 2019-20; and eleven percent (11%) of the District's monthly premium cost per month in plan year 2020-21.
 - (d) The Board shall pay one hundred percent (100%) of the premium cost of the POS C2-F1-O1 Plan less monthly mandatory payroll deductions of seven percent (7%) of the District's monthly premium cost per month in plan year 2018-19; eight percent (8%) of the District's monthly premium cost per month in plan year 2019-20; and nine percent (9%) of the District's monthly premium cost per month in plan year 2020-21.
3. As a method to permit Managers to pay for their share of Health Benefit Plan premiums (and other eligible premiums) through pre-federal income tax instead of after-federal income tax contributions, the Board agrees to sponsor an Internal Revenue Code Section 125 Flexible Spending Account Plan. This sponsorship is contingent upon the same being permitted pursuant to law.

4. Under the Section 125 Cafeteria Plan, Managers shall, prior to the period of time designated by the Board as the “Plan Year” as required by IRS Treasury Regulations, in addition to the option of selecting coverage under a health benefit plan for the upcoming plan year, also have the option to elect not to be covered under any Board sponsored Health Benefit Plan for the plan year. Any Manager, who waives all coverage available to the Manager and all eligible dependents for a plan year, shall be eligible to receive a cash bonus equal to \$5,500

Any Manager who has so waived coverage and received a cash bonus and (i) is permitted under the terms of the Section 125 Plan to revoke the Manager’s waiver for the remainder of the plan year or (ii) is no longer working for the District until the end of the plan year for which the coverage has been waived, agrees, if the bonus has been paid for a period when coverage is in place or post-termination of employment, to reimburse the District (and be deemed to have authorized the payroll withholding therefore) for an amount equal to the number of days left in the plan year on the date of revocation or termination divided by the total working days in the school year times the cash bonus payments. The District may elect the payment schedule providing for the payment of a cash bonus on or before the first pay in October.

B. Prescription Plan

The Board shall make available and pay the premium for Managers enrolled in any one of the health benefit plans a five (\$5.00) generic, a thirty (\$30.00) brand-formulary, and a fifty-five (\$55.00) non-formulary prescription benefit program. Notwithstanding the above, a Manager shall pay no more than one (1) co-pay per three (3) month supply of maintenance medications. The District may enroll in and utilize the following prescription drug utilization management programs: Quantity Management, Exclusive Specialty, and National Preferred Formulary.

C. Dental Insurance

1. The Board will pay for the basic dental care and supplemental basic prosthetics and periodontics coverage for each full-time Manager. The coverage for basic is 100% and for supplemental basic, prosthetics and periodontics 80% of eligible claims. The maximum benefit for basic dental care and supplemental basic, prosthetics and periodontics is \$1,500 per year.
2. The Board will pay 75% of the premium cost for basic and supplemental dental care for family coverage for each full-time Manager with eligible dependents. In order to receive the coverage, the following rules apply:
 - (a) Enrollment regulations of the insurance carrier will apply;
 - (b) Managers working less than full-time on a regular basis shall benefit in a proportionate payment for their dental insurance;

- (c) The amount of premium to be paid by the Manager must be payroll deducted.

D. Carrier/Plan Design Substitution

The Board may substitute carriers and/or plan designs provided all coverage, requirements, and procedures are substantially equivalent to the plan for which the substitution was made. If a substitution is made, the Board will notify the Managers of the following:

- (a) The identity of the new carrier/plan design.
- (b) The address and telephone number of the new carrier or substance of the plan design.
- (c) The person to be contacted at the new carrier/third party administrator's office.
- (d) A summary plan description of the benefits provided by the new carrier/plan design.

E. No Duplication of Benefits - Spouse Managers

If husband and wife are both employees of the School District, each shall be eligible for single insurance coverage benefits and either husband or wife is eligible for dependent coverage, but not both.

F. Excise Tax

During the term of this Management Compensation Plan, or at any time after its expiration date until such time as a new Plan is implemented, should the premium for any medical plan (in combination with the prescription plan and any Board-provided flexible spending accounts) offered pursuant to the Plan exceed the threshold amounts as stated in the Patient Protection and Affordable Care Act (or any applicable federal or state legislation enacted hereinafter) so as to subject the medical plan or plans to excise taxes, taxes, or penalties as the result of the combined plans exceeding the thresholds, the issue will be addressed as follows:

- (a) The District shall notify the Managers that the plan or plans that are offered pursuant to the Agreement will be subject or will likely be subject to the above-referenced tax or fee;
- (b) Managers who are enrolled in a plan or plans that are offered pursuant to this Plan that will be subject to the above-referenced tax or fee will be entitled to receive the richest plan offered by the District that would not be subject to the tax or the fee. Existing Manager premium share shall apply on the same basis as the premium share defined for those plans currently in place covered by this Plan.

- (c) If all of the plans offered by the District would be subject to the tax or the fee, the District shall notify the Managers that the plan or plans that are offered pursuant to this Plan will be subject to the above- referenced tax or fee and what it intends to do to eliminate the tax or fee;
- (d) Managers will have up to 30 calendar days from the date of such notice to meet and discuss with the Board on addressing the issue of plan design changes or increased premium share;
- (e) If the Board elects to adopt any of the suggestions made by the Managers during this 30 day time period, that adoption shall become part of the Plan and will supersede any inconsistent provisions.
- (f) If the Board does not adopt any of the Manager’s suggestions within the 30 calendar day period referenced in subsection (d), all Managers enrolled in the health benefit plan or plans subject to the tax or fee shall no longer be entitled to remain in the health benefit plan or plans that are subject to the tax or fee and would be entitled to receive the richest plan offered by the exchange/marketplace that would not be subject to the tax or fee. Notwithstanding the foregoing, existing Manager premium share shall apply on the same basis as the least rich eliminated health benefit plan.

G. Life Insurance

The District will provide, without charge, term life insurance for all Managers working more than twenty (20) hours per week in the amount double their annual salary rounded to the next highest thousand dollars.

H. Tuition Reimbursement

The District, with the advance preapproval of the Superintendent, will reimburse Managers 100% for related course work approved in advance up to \$8,000.00 in each Plan Year of this Agreement. Managers in preapproved doctoral programs taking course work approved in advance by the Superintendent will receive an additional \$1,500.00 of reimbursement each year. In all cases, only grades of “B” or better or “pass” in a pass/fail course will be eligible for reimbursement.

In order to receive reimbursement approval, the Manager shall sign an agreement that all reimbursement received for courses taken during the fiscal year will be returned to the District if the Manager does not continue employment in the District for two (2) calendar years following the completion of the approved course. An exception to this requirement will be made for Managers who die, who leave the employ of the District as the result of a disability, or who are furloughed but will not apply to terminations for cause.

I. Disability Program

During the term of this Plan, the District shall sponsor a group term disability insurance program for all active full-time Managers providing for a minimum benefit waiting period of 180 days or at the end of the Manager's sick leave, whichever is longer, that will provide a disability benefit to a maximum monthly benefit of \$6,500.00 per month. The sponsorship of this program is contingent upon at least 75% of the Managers enrolling in the disability insurance program. Managers shall pay 20% of the premium charges for this program through mandatory payroll deductions.

J. Retirement Allowances

1. Sick Leave Payment

When a Manager retires under any of the provisions of the Pennsylvania Public School Employees' Retirement Law from the District, the District shall make the following payments as a non-elective employer contribution into each Manager's account under the Plan in accordance with Internal Revenue Code Section 403(b)(3):

- (a) An employer contribution equal to that Manager's per diem rate of pay times a maximum of 45 days of any accumulated sick leave remaining at the end of the prior service year. The per diem rate will be calculated by using the actual number of contracted days worked (210, 220, or 228 for 12-month employees or 189 days for 10-month employees); and
- (b) Managers who submit such resignation in writing to the District's Personnel Office at least five (5) months prior to retirement shall receive an additional lump sum payment upon retirement of an amount equal to the per diem rate of pay for the Manager's last year of service times 50% of up to 30 days of unused but accumulated sick leave.

Prior to the District's contributions being made, an account shall be established by the eligible Manager consistent with the District's Plan, designating one or more vendors from the list of vendors available to Managers under said Plan. All District contributions will be considered non-elective contributions and will be subject to the limits established by law for such accounts.

Further, if the District's non-elective contribution exceeds the limits established for the relevant Plan Year in which the Manager retires, the District shall contribute as an employer non-elective contribution to one or more accounts described in the Plan and designated by the Manager an amount up to and equal to the established limits for such contributions in subsequent years for a period of the lesser of: (i) five (5) years following the date of termination; or (ii) until the benefit amount is exhausted. In the

event the Manager dies before the benefit amount described above is exhausted, the remaining benefit shall be forfeited by such Manager.

2. Early Retirement and Performance Incentive Plan

If the Manager earns a rating of distinguished, or proficient in each of the last three years prior to retirement, unless specifically waived by the Superintendent and the Board of School Directors, the Manager shall be entitled to receive a District contribution toward the cost of hospitalization/major medical/surgical benefits if the Manager meets the following guidelines:

(a) Criteria for Eligibility

The Manager seeking retirement must have been, at the time of retirement, a full-time Manager with a minimum of five (5) years of employment with the Upper Merion Area School District.

The Manager must not otherwise be eligible for a disability pension pursuant to the Pennsylvania School Employees' Retirement System.

The Manager must be retiring pursuant to the provisions of the Pennsylvania School Employees' Retirement System and shall be required to submit verification of such compliance with the retirement provisions pursuant to the Pennsylvania School Employees' Retirement System to the Office of the Superintendent of the Upper Merion Area School District.

The Managers applying for this benefit will not be permitted to avail themselves of this Plan in the event that the Manager would be completing a sabbatical leave or leave for professional development less than one (1) year prior to retirement.

Managers who do not comply with all of the requirements for eligibility for this Plan shall not be eligible for any of the benefits contained herein.

(b) Incentive Plan

Upon fulfilling the criteria for eligibility stated in this Plan, the retiring Manager shall be entitled to receive a District contribution toward the purchase of hospitalization/major medical/surgical benefits, for a health benefit plan not offered by the District (such as the PSERS Health Options Plan, a plan of a private insurance carrier, or a plan offered by the Exchange), so long as the law permits.

Such contributions shall be paid by the District for the shorter of any one (1) of the following periods:

- (1) A total of ten (10) school years following the effective date of retiring;
- (2) Reinstatement or rehiring of the retiring Manager as a full-time professional employee of any Pennsylvania public school district.
- (3) Death of the retiring Manager; or
- (4) Should the retiring Manager become Medicare eligible during the 10 year time period, the District will only pay for the premiums for the Medicare supplement (Medigap coverage) at the time when the Manager becomes Medicare eligible.

In the event that the retiring Manager were to predecease the retiring Manager's spouse and/or eligible dependents, the surviving spouse and/or eligible dependents shall be entitled to continue the health insurance coverage under the terms and conditions described above for the retiring Manager, assuming the insurer and law permit.

Prescription, dental, or life insurance would not be covered as part of this benefit. Notwithstanding the foregoing, dental benefits may be continued by the retiring Manager at the retiring Manager's own expense pursuant to Section 5-513 of the Public School Code of 1949.

(c) Incentive Plan Contribution Schedule

The District shall contribute through the course of said health insurance benefits in accordance with the following formula during the term applicable to this Plan.

Annually, the lesser of: 50% in the 2018-2019, 2019-2020 and 2020-2021 Plan Years verified health insurance benefits for the retiring Manager, the retiring Manager's spouse, and the retiring Manager's eligible dependents or a maximum of \$10,000.00 in each Plan year of this Agreement toward a health benefit plan offered by a non-District provider, such as the PSERS Health Options Plan, a plan of a private insurance carrier, or a plan offered by the Exchange.

(d) Payment of Premiums

So long as the retiring Manager remains eligible pursuant to this Plan, the District shall make contributions toward a health benefit plan offered by a non-District provider, such as the PSERS Health Options Plan, a plan of a private insurance carrier, or a plan offered by the Exchange. In the event that the required Board contribution pursuant to this Plan is insufficient to pay the costs of said health plan coverages elected, the balance of the premiums shall be paid by the retiring Manager. Proof of such coverage must be provided by the Manager to the District each year.

K. Death Benefit

It is possible that the Manager, entitled to receive benefits under this Management Compensation Plan, could die before all benefits are received. Should this occur, benefits due but not yet paid will be paid to the same beneficiary designated by the Manager to receive benefits under the Public School Employees' Retirement System, so long as the same is permitted by law.

In the event of the death of any Manager, their beneficiary shall be paid the balance of salary for that week in which death occurs, plus all earned vacation days, plus any other applicable payments, other than specifically circumscribed herein or not permitted by law.

L. Personal Leave

Managers will be allowed, with full pay, up to five (5) days per year for personal leave.

Such personal leave shall be for the purpose of transacting personal matters which cannot be transacted at a time other than during the school day. All unused personal leave will be cumulative as sick leave.

Whenever possible, application for approval should be submitted one week in advance, except in the case of an emergency. When the day involved is that day preceding or following a holiday or vacation day, prior approval of the Superintendent is necessary.

M. Sick Leave

1. Personal Illness

Managers working on a 12-month basis will be eligible for fifteen (15) days sick leave per year. Managers are eligible to use up to four (4) sick days per year for the purpose of family illness. In order to be eligible for family illness, the individual must be an immediate family member as defined in funeral leave in Subparagraph N. of this section.

Those Managers on a 10-month basis will be eligible for thirteen (13) days per year.

2. Extended Illness

In case of extended illness, when the Manager has exhausted all allotted and accumulated sick leave, salary may be continued for an additional period.

In determining the amount and duration of any such payments, the following facts will be considered.

- (a) Value of Manager on assigned work
- (b) Previous and potential contribution
- (c) Length of employment
- (d) Previous absence record
- (e) Other considerations such as the nature of the absence, the need, etc.
- (f) Payments previously made to other administrators under similar situation.

The Superintendent of Schools may approve payment for up to sixty (60) additional days. Payment for an additional sixty (60) days for Managers with more than three (3) years service may be made with approval of the Board of School Directors.

N. Funeral Leave

The Board shall grant a Manager not in excess of five (5) days with pay for each death in the immediate family. "Immediate family" shall be defined as wife, husband, son, daughter, mother, father, sister, brother, parents-in-law, son-in-law, daughter-in-law, or near relative who resides in the same household, or any person with whom the Manager has made his/her home. Such absences shall be reported to the school on the first day. Additional time may be granted at the discretion of the Superintendent.

The Manager shall be entitled to one day without loss of compensation for attendance at the funeral of a first cousin, grandfather, grandmother, aunt, uncle, niece, nephew, brother-in-law or sister-in-law.

O. Military Leave

A military leave of absence shall be granted to any Manager who shall enlist for military duty in any branch of the armed forces of the United States.

P. Sabbatical Leave/Professional Development Leave

Sabbatical and/or Professional Development leaves of absence shall be granted to eligible Managers in accordance with the Public School Code of the Commonwealth of Pennsylvania and Board policy.

Q. Maternity Leave

Female Managers who become pregnant may continue to work as long as their personal physician certifies they are able to fulfill the duties of their position. They shall be entitled to a maternity leave without pay, benefits to be in accordance with the Family and Medical Leave Act until such time as their personal physician certifies that they are able to return to work. This maternity leave shall not exceed sixteen (16) calendar months.

At the termination of the maternity leave, the Manager shall be eligible to return to the same or a similar position as that which she previously held subject to the rights of the School Board under the School Code. Upon returning to work at the termination of a maternity leave, all benefits and seniority rights accrued at the beginning of the maternity leave or accrued during any sick leave, if any, shall be reinstated.

During maternity leave, the Manager may use her accumulated sick leave during and physician certified disability period when she is unable to perform her duties because she is restricted either to a hospital or to home for personal medical reasons related to the birth of a child. Requests for sick leave while on maternity leave, during the four-week period immediately following delivery of the child must be accompanied by a certification from the Manager's personal physician that the Manager was unable to perform her duties because she was restricted to a hospital or home for personal medical reasons related to the birth of a child during the period for which sick leave is requested. The Superintendent may, in his/her discretion, submit the physician's certification to a physician appointed by the Board for review.

In the event this physician agrees with the personal physician, the leave shall be granted. If the two physicians cannot agree, the certification will be submitted to a third physician selected by the two physicians or appointed by the Montgomery County Medical Society if they cannot agree, for final determination. The charge of the third physician will be borne by the District.

Managers shall indicate their intent to return to work during the four-week period immediately following delivery.

R. Professional Visitations and Conferences

Managers are encouraged to participate actively in professional meetings which will assist the Manager to grow in service to the School District. To this end, the Board of School Directors will consider for approval absences from duty for attendance at such meetings without loss of pay and will reimburse necessary expenses incurred in such attendance.

The Superintendent shall establish the following conditions requisite to approval: budgetary limitations; number of personnel requesting leave from any one building on any one day; unnecessary duplication of visitations and conferences.

S. Absence for Compensated Civic and Honorary Duties

The Upper Merion Area Board of School Directors recognizes that Managers have civic and honorary duties for which they are required to attend (such as jury duty and professional honorary activities). The Manager may receive his or her full salary less any reimbursement received for fulfilling the obligation. Travel and other cost allowances shall not be considered compensation. Managers on jury duty who are dismissed for one-half day or more shall return to work.

T. Vacations and Holidays

1. Vacations

All Managers working on a 12-month basis will receive twenty-one (21) paid vacation days per year. A Manager may not receive compensation for more than twenty one (21) vacation days upon resignation or retirement (per diem calculation based on 228 days). Twelve-month Managers who are employed for less than a complete school year due to termination of employment or being newly hired will receive vacations days on a prorated basis. (1¾ days per month based on an annual total of 21 days.)

Those Managers working on a 10-month basis will not be eligible for vacation days.

From June 1 - June 15 of the year preceding the year for which vacation days are allocated, a manager may request compensation for up to 5 vacation days at the per diem rate for the year the vacation days are to be allocated in exchange for forfeiting those days. This amount will be paid as a lump sum in the first payroll of July of the year for which the vacation days were forfeited. (For example, In exchange for forfeiting those days, a manager may request compensation of 5 vacation days from his/her 2018-19 allocation between June 1, 2018 and June 15, 2018. This compensation will be paid in the first payroll of July 2018. These 5 days will be forfeited and the manager will accrue 16 vacation days in 2018-19.) This amount will not become a part of the base salary nor be considered in the calculation of the next year's salary.

In order to receive approval for compensation in exchange for forfeiture of vacation days, the Manager shall sign an agreement that a pro rata portion of the compensation received will be returned to the District if the Manager does not continue employment through the duration required to accrue the number of days for which compensation was provided. This pro rata calculation will be based on the accrual of 1¾ days per month (based on an annual total of 21 days).

Any vacation days accrued but unused nor forfeited for compensation during a fiscal year may not be accumulated beyond August 31 of the second fiscal year immediately following the fiscal year in which the vacation days were credited. (For example, a manager who has 10 vacation

days accrued but unused nor forfeited for compensation for the fiscal year beginning July 1, 2018, and ending June 30, 2019, must use those 10 days on or before August 31, 2020). Any vacation days accrued but unused nor forfeited for compensation as of the August 31 cutoff date shall be forfeited.

Under unusual circumstances, a Manager may request to have up to five (5) vacation days accrued but unused nor forfeited extend beyond the August 31st cutoff date. The Superintendent will consider the request with respect to the completion of building and District goals. If the Manager was involved with special projects, assignments, or goals, the Superintendent is authorized by the Board to approve such requests. Provided, however, that in no event shall any accrued but unused vacation days extending beyond the August 31st cutoff date extend beyond December 31st following the cutoff date.

2. **Holidays**

All Managers working on a 12-month basis will receive twelve (12) paid holidays per year. One of the twelve holidays will fall within the Christmas break. The holiday will be designated by the Superintendent based on the staffing needs of the District.

Holidays for the school year will be posted at the beginning of the school year.

Those Managers working on a 10-month basis will not be eligible for paid holidays.

U. Tax Sheltered Annuity

The District shall annually contribute to each full-time Manager a non-elective contribution of \$1,500 to the Manager's tax-sheltered annuity plan in accordance with the District's 403(b) Plan.

V. Meet and Discuss on Benefits

Whenever the Board of School Directors approves a contract for the Professional Employees containing a fringe benefit which exceeds or is less than that available to the Managers, the Board and Managers agree to meet and discuss this item after receiving a request from the other party.

W. Real Estate Tax Language.

Notwithstanding the compensation and benefits provisions contained in this Agreement, if the Upper Merion Area Education Association during the term of this Agreement agrees to either reopen its Collective Bargaining Agreement on the basis that the District is unable to maintain the prior fiscal year's total level of revenues plus an additional 2% incremental increase in revenues as the result of: (1) legislation that substantively limits the right of the District to increase its revenues by raising taxes, such as through backend or frontend referendum

provisions; or (2) legislation that substantively limits the District's real estate tax income through any methodology, including but not limited to preventing the District from filing or defending real estate tax assessment appeals, or through the process of binding arbitration, the Act 93 Group agrees to modify the compensation and benefits provisions contained in this Agreement to parallel the modifications agreed to by the Upper Merion Area Education Association in the reopening of its Collective Bargaining Agreement based upon Paragraph 21.1.4 in the 2017-2020 Collective Bargaining Agreement between the District and the Upper Merion Area Education Association. In case of dispute, the District will be able to make modifications to parallel the concessions made by the Upper Merion Area Education Association.

VI. DISPUTES

In the event that a dispute shall arise out of the terms of this Plan, such dispute shall be resolved in the following manner:

- A. Representatives of the Managers shall meet and discuss the dispute with the Superintendent of Schools and hopefully resolve the matter at that level;
- B. Representatives of the Board of School Directors and the Managers shall meet and discuss the dispute, and the Board of School Directors shall ultimately determine the final resolution of any such dispute.

VII. AMENDMENTS TO PLAN

In the event that there is any change in the law which impacts the delivery of any one of the terms and conditions of employment reflected in Plan, the Board reserves the right to amend this Plan in order to conform to the law within its discretion.

EXHIBIT “A”

Upper Merion Area School District Management Evaluation and Compensation Plan

Upper Merion Area School District Management Evaluation and Compensation Philosophy

The Upper Merion Area School District Board of Directors believes that our Managers, as leaders of the Upper Merion Area School District, should be both held accountable for and compensated for the well-being and growth of the district.

As a management team, our leaders acknowledge that working together they have greater strength and effectiveness than any one individual.

Our leaders acknowledge that to be most effective as a management team they must share their strengths with each other and seek out others to assist with their challenges.

Our ultimate goal is to inspire excellence in every student, every day. If successful in meeting that goal, we will assure students' academic success, and we will create for students a nurturing environment that challenges them, supports them, and enhances their lives. Regardless of individual areas of responsibility, the results of all of our efforts should flow toward meeting that goal.

Act 93 Management Compensation Plan Evaluation Guidelines

Performance Indicators become a composite rating based upon criteria set forth in the UMASD Administrator Performance Appraisal modified in the agreement between the Board of School Directors and the UMASD Managers for the Compensation Plan affecting ratings for July 1, 2018 through June 30, 2021.

Performance will be evaluated by the immediate supervisor of each Manager and a recommendation will be made to the Superintendent. The final rating for each Manager ultimately will be made by the Superintendent.

Managers receiving a satisfactory or proficient rating will receive the following salary increases:

For 2018-19 based upon performance during the 2017-18 year: 2.5%

For 2019-20 based upon performance during the 2018-19 year: 2.5%

For 2020-21 based upon performance during the 2019-20 year: 2.5%

It is understood that in unusual circumstances a Manager's performance or judgment might be so lacking in a particular area or in a particular circumstance as to override other rating considerations. Should that occur, the Superintendent will provide a written explanation of the rating to the Manager.



UMASD Administrative Framework for Leadership

Date:

Name:

Self-Assessment

Supervisor Assessment

Domain 1: Strategic/Cultural Leadership

Administrators/organization leaders systemically and collaboratively develop a positive culture to promote staff development, organizational improvement and meet the needs of all stakeholders. They articulate and model a clear vision of UMASD’s Comprehensive Plan and develop a culture that involves all stakeholders.

Component	Failing	Needs Improvement	Proficient	Distinguished
<p>1a: Creates and/or Supports Organizational Vision, Mission, and Strategic Goals:</p> <p>The administrator is part of a team that plans strategically to design and meet the organizational vision mission, and goals.</p>	<p>The administrator/leader fails to satisfy the component as defined.</p> <p>The administrator/leader fails to plan and work towards organization wide vision, mission, strategic intents and/or goals in a focused or effective manner.</p> <p>The administrator/leader fails to demonstrate the involvement of staff and stakeholders in a strategic process that leads to the development or support of the organization’s strategic intents, vision, mission, and/or goals.</p>	<p>The administrator/leader develops and/or supports organization wide vision, mission, and strategic goals based on his/her own individual beliefs with limited evidence of stakeholder involvement.</p>	<p>The administrator/leader implements a process that includes stakeholders for developing and/or supporting a shared vision and strategic goals for improvement.</p> <p>The administrator/leader maintains a focus on the vision and strategic goals throughout the year.</p> <p>The administrator/leader ensures that staff incorporates the organization’s vision, mission, and strategic intents in their plans to assure that expected outcomes are achieved.</p>	<p>... and</p> <p>The administrator/leader demonstrates a solid knowledge base of research, concepts, examples, possibilities, and sound reason that support the organizational vision.</p> <p>The administrator/leader is able to provide a clear and compelling explanation of the assumptions, beliefs, and paradigm thinking that underlie the vision.</p> <p>The administrator/leader demonstrates a clearly articulated moral foundation.</p> <p>The administrator/leader systematically ensures that the organization’s strategic intents, vision, mission, values, beliefs and goals drive decisions that positively influence the culture of the organization.</p>

Domain 1: Strategic/Cultural Leadership				
Administrators/organization leaders systemically and collaboratively develop a positive culture to promote staff development, organizational improvement and meet the needs of all stakeholders. They articulate and model a clear vision of UMASD's Comprehensive Plan and develop a culture that involves all stakeholders.				
Component	Failing	Needs Improvement	Proficient	Distinguished
				The administrator/leader designs, initiates, and/or implements collaborative processes to collect and analyze data about the organization's progress for periodic review and revision of the organization's vision, mission, and strategic goals.
1b: Uses Data for Informed Decision Making: The administrator/leader analyzes and uses multiple data sources to drive effective decision-making.	The administrator/leader fails to satisfy the component as defined. The administrator/leader fails to demonstrate the ability to analyze or use data to drive effective decision-making.	The administrator/leader infrequently uses data and assessments to monitor efficiency or progress of services and programs. The administrator/leader exhibits the inability to develop the capacity of staff and other stakeholders to use data for decision-making.	The administrator/leader collects, analyzes, monitors, and uses data systematically regarding the organization's progress in driving informed decision-making for the attainment of strategic goals and objectives. The administrator/leader develops the capacity of staff and other stakeholders to use data for decision-making.	... and The administrator/leader activates and/or sustains an organization wide system for monitoring and evaluating progress toward achieving organization goals and assessing the quality of service delivery. The administrator/leader listens, evaluates, and considers staff and other stakeholders input regarding recommended activities, initiatives, programs and/or services.

Domain 1: Strategic/Cultural Leadership				
Administrators/organization leaders systemically and collaboratively develop a positive culture to promote staff development, organizational improvement and meet the needs of all stakeholders. They articulate and model a clear vision of UMASD's Comprehensive Plan and develop a culture that involves all stakeholders.				
Component	Failing	Needs Improvement	Proficient	Distinguished
<p>1c: Builds a Collaborative and Empowering Work Environment:</p> <p>The administrator/leader develops and/or sustains a culture of collaboration, distributive leadership, and continuous improvement.</p> <p>The administrator/leader empower staff in the development and successful implementation of initiatives, programs and/or services that serve all stakeholders.</p>	<p>The administrator/leader fails to satisfy the component as defined.</p> <p>The administrator/leader fails to demonstrate the involvement of staff and stakeholders in discussions and decisions regarding organization issues.</p>	<p>The administrator/leader frequently makes unilateral decisions (uses distributive leadership infrequently).</p> <p>The administrator/leader inconsistently includes relevant stakeholders in the decision-making processes.</p> <p>The administrator/leader articulates the importance of building a sense of empowerment among staff, but only sporadically incorporates activities, tools, and protocols to develop empowerment among staff.</p>	<p>The administrator/leader creates a collaborative work environment predicated upon cooperation among and between relevant stakeholders.</p> <p>The administrator/leader consistently engages in shared decision-making and distributive leadership.</p> <p>The administrator/leader actively models behaviors that promote a sense of empowerment among staff and stakeholders.</p>	<p>... and</p> <p>The administrator/leader empowers staff and other stakeholders to assume responsibility for making decisions regarding the organization culture and improvement, focus on building capacity.</p> <p>The administrator/leader establishes an empowering culture that supports:</p> <ul style="list-style-type: none"> • Openness • Innovation • Cooperation • Success <p>And involves everyone in productive change.</p>
<p>1d: Leads Change Efforts for Continuous Improvement:</p> <p>The administrator/leader systematically guides staff through the change process to positively impact the culture and performance of the organization.</p>	<p>The administrator/leader fails to satisfy the component as defined.</p> <p>The administrator/leader fails to identify the importance of the change process with no provision for positively impacting the culture and performance of the organization.</p>	<p>The administrator/leader articulates the importance of the change process; however, when change occurs, it is only through random processes and lacks articulation and/or transparency.</p>	<p>The administrator/leader implements a change process to ensure continuous organization improvement and is able to articulate and communicate effectively throughout the change process to support completion and success.</p>	<p>... and</p> <p>The administrator/leader drives major initiatives that help the organization through transition and enlists others to assist.</p> <p>The administrator/leader systematically examines the status quo, identifies beneficial changes, and leads the change process to successful completion with effective communication and appropriate transparency.</p>
1e: Celebrates	The administrator/leader fails to	The administrator/leader	The administrator/leader	... and

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Domain 1: Strategic/Cultural Leadership				
Administrators/organization leaders systemically and collaboratively develop a positive culture to promote staff development, organizational improvement and meet the needs of all stakeholders. They articulate and model a clear vision of UMASD's Comprehensive Plan and develop a culture that involves all stakeholders.				
Component	Failing	Needs Improvement	Proficient	Distinguished
<p><i>Accomplishments and Acknowledges Failures:</i></p> <p>The administrator/leader utilizes lessons from accomplishments and failures to positively impact the culture and performance of the organization.</p>	<p>satisfy the component as defined.</p> <p>The administrator/leader consistently fails to utilize lessons from accomplishments and failures to positively impact the culture and performance of the organization.</p>	<p>inconsistently utilizes lessons from accomplishments and failures to positively impact the culture and performance of the organization.</p>	<p>recognizes and celebrates individual and collective contributions in a systematic manner toward attainment of strategic goals.</p> <p>When appropriate the administrator/leader utilizes failure as an opportunity to improve organization culture and performance.</p> <p>Failures are analyzed for the purpose of reducing similar errors in the future.</p>	<p>The administrator/leader systematically utilizes recognition, reward, and advancement as a way to promote the accomplishments of the organization.</p>

Domain 2: Systems Leadership				
Administrators/organization leaders ensure that there are processes and systems in place for budgeting, staffing, problem solving, communicating expectations and developing programs and services that result in organizing the work routines of the organization. They manage efficiently, effectively and safely to foster innovative thinking, build relationships and deliver results.				
Component	Failing	Needs Improvement	Proficient	Distinguished
<p>2a: Leverages Human and Financial Resources:</p> <p>The administrator/leader establishes systems for marshaling all available resources to better serve staff, clients and the organization.</p>	<p>The administrator/leader fails to satisfy the component as defined.</p> <p>The administrator/leader fails to systematically allocate human and financial resources that support the strategic intents, vision, mission, and goals of the organization.</p> <p>The lack of appropriate allocation has a negative impact on staff, clients and/or the organization.</p>	<p>The administrator/leader utilizes systems for allocating human and financial resources that are not transparent or are not effective.</p> <p>Evidence demonstrates a lack of understanding of balancing cost and quality for service delivery which sometimes results in negatively impacting staff, and/or the organization.</p>	<p>The administrator/leader designs transparent systems to equitably manage human and financial resources.</p> <p>The administrator/leader ensures the strategic allocation and equitable use of human and financial resources to meet strategic intents, goals and support collaborative efforts across the organization.</p> <p>The administrator/leader executes programs and services that demonstrates an understanding of balancing quality and cost in a responsive way to all stakeholders.</p>	<p>... and</p> <p>The administrator/leader integrates all resources to maximize the efficiency of internal operations.</p>
<p>2b: Ensures a High Quality, High Performing Staff:</p> <p>The administrator/leader establishes, supports and effectively manages processes and systems, which ensure a high quality, high performing staff.</p>	<p>The administrator/leader fails to satisfy the component as defined.</p> <p>The administrator/leader fails to maintain a high performing staff, which is focused on improvement.</p> <p>The administrator/leader fails to address ineffective service delivery and inadequate staff performance.</p> <p>The administrator/leader fails to provide induction and/or sufficient training and support to all new staff and/or personnel new to his/her position.</p> <p>The administrator/leader fails to select and retain highly qualified</p>	<p>The administrator/leader inconsistently supervises and/or inequitably evaluates staff.</p> <p>Timelines and/or processes are not followed.</p> <p>The administrator/leader provides limited support or training to all new personnel that result in low productivity and/or efficiency.</p> <p>The administrator/leader inconsistently selects and retains highly qualified personnel. Staff turnover results in creating gaps that effect systems running efficiently within the organization or halt progress towards meeting strategic intents and/or goals.</p>	<p>The administrator/leader supervises and evaluates all staff in a fair and equitable manner following UMASD procedures and timelines and uses the results to improve performance.</p> <p>The administrator/leader recruits and retains high quality staff that meets the diverse needs of the organization in areas of both character and competence.</p> <p>The administrator/leader actively participates with appropriate personnel to select highly qualified staff.</p> <p>The administrator/leader provides induction processes and/or training to support all</p>	<p>... and</p> <p>The administrator/leader proactively recommends decisions regarding hiring, transfers, retention and dismissal.</p> <p>The administrator/leader proactively recognizes quality performance and establishes it as an example of expected performance of others.</p> <p>The administrator/leader ties human resources decisions to achieving the vision and goals of the organization within fiscal parameters.</p> <p>The administrator/leader proactively creates additional</p>

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Domain 2: Systems Leadership				
Administrators/organization leaders ensure that there are processes and systems in place for budgeting, staffing, problem solving, communicating expectations and developing programs and services that result in organizing the work routines of the organization. They manage efficiently, effectively and safely to foster innovative thinking, build relationships and deliver results.				
Component	Failing	Needs Improvement	Proficient	Distinguished
	personnel. Staff turnover is a result of ineffective leadership, supports and/or guidance.		new personnel and/or personnel new to his/her position. The administrator/leader maintains a high performing staff, which is focused on meeting District expectations.	induction and/or training opportunities systemically to support all new personnel and/or personnel new to his/her position.
2c: Complies with Federal/State Mandates and Contractual Agreements: The administrator/leader designs and/or implements policies, protocols and/or processes in order to comply with federal, state and UMASD policies.	The administrator/leader fails to satisfy the component as defined. The administrator/leader fails to comply with policies, protocols and/or processes related to state, federal and UMASD mandates and contractual agreements with agencies in a timely manner.	The administrator/leader inconsistently complies with federal, state and UMASD mandates and/or all contractual agreements with agencies in a timely and/or complete manner.	The administrator/leader proactively designs and applies protocols and processes in order to comply with federal, state and UMASD mandates and contractual agreements with agencies in a timely and complete manner.	...and The administrator/leader presents federal, state and UMASD mandates so that such mandates are viewed as an opportunity for improvement/refinement within the organization. The administrator/leader identifies opportunities for improvement. The administrator/leader implements related programs supported by the organization community.
2d: Establishes and Implements Expectations for Staff: The administrator/leader establishes and/or implements clear expectations, structures, rules, and procedures for staff, partners and/or agencies.	The administrator/leader fails to satisfy the component as defined. The administrator/leader fails to establish and/or implement clear expectations, structures, rules, and procedures for staff, partners and/or agencies.	The administrator/leader utilizes only organization rules and procedures required by UMASD administration and/or organization policy. The administrator/leader inconsistently communicates and enforces expectations, rules, and procedures for staff, partners and/or agencies.	The administrator/leader engages staff, member districts, partners and/or agencies in collaboratively developing expectations for improved relationships and service delivery. The administrator/leader creates and revises rules and procedures to maintain an efficient and positive organization culture conducive to high performance of staff.	... and The administrator/leader creates feedback loops that help people see how well they are doing.

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Domain 2: Systems Leadership				
Administrators/organization leaders ensure that there are processes and systems in place for budgeting, staffing, problem solving, communicating expectations and developing programs and services that result in organizing the work routines of the organization. They manage efficiently, effectively and safely to foster innovative thinking, build relationships and deliver results.				
Component	Failing	Needs Improvement	Proficient	Distinguished
			The administrator/leader communicates and enforces clear expectations, structures, and fair rules and procedures for all constituents.	
<p>2e: Communicates Effectively and Strategically:</p> <p>The administrator/leader strategically designs and utilizes various forms of formal and informal communication with all staff and stakeholders.</p>	<p>The administrator/leader fails to satisfy the component as defined.</p> <p>The administrator/leader fails to develop a coherent plan to effectively communicate with all staff and stakeholders.</p>	<p>The administrator/leader defines a communications plan for staff and stakeholders; however, actual communications lack purpose, clarity, consistency and/or regularity.</p>	<p>The administrator/leader designs and utilizes a system of open communication that provides for the timely, responsible sharing of information to, from, and with staff and stakeholders.</p> <p>The administrator/leader provides information in various formats in multiple ways through different media in order to ensure communication with staff and stakeholders.</p>	<p>... and</p> <p>The administrator/leader ensures that staff and stakeholders are aware of strategic intents, department goals and the activities used to progress toward and meet set expectations.</p>
<p>2f: Manages Conflict Constructively:</p> <p>The administrator/leader effectively and efficiently manages the complexity of human interactions and relationships, including those among and between staff, and all stakeholders.</p>	<p>The administrator/leader fails to satisfy the component as defined.</p> <p>The administrator/leader fails to develop and implement conflict management processes to manage the complexity of human interactions and relationships.</p>	<p>The administrator/leader inconsistently implements processes to resolve problems and/or areas of conflict within the organization.</p> <p>The administrator/leader interacts with staff and other stakeholders primarily on an as needed basis in order to defuse potentially stressful situations.</p>	<p>The administrator/leader consistently resolves organization-based problems/conflicts in a fair, democratic way.</p> <p>The administrator/leader provides opportunities for affected stakeholders to express opinions and discusses options to address discordant issues.</p> <p>The administrator/leader implements and reviews solutions that address discordant issues.</p>	<p>... and</p> <p>The administrator/leader provides conflict management and relationship building training for staff and/or other stakeholders.</p> <p>The administrator/leader empowers staff and others to engage in relationship building activities designed to avoid conflict and maintain a positive organization climate.</p> <p>The administrator/leader encourages staff to accept responsibility for their own actions by adhering to operational norms.</p>
2g: Ensures Organization	The administrator/leader fails to	The administrator/leader lacks a	The administrator/leader	... and

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Domain 2: Systems Leadership

Administrators/organization leaders ensure that there are processes and systems in place for budgeting, staffing, problem solving, communicating expectations and developing programs and services that result in organizing the work routines of the organization. They manage efficiently, effectively and safely to foster innovative thinking, build relationships and deliver results.

Component	Failing	Needs Improvement	Proficient	Distinguished
<p>Safety:</p> <p>The administrator/leader adheres to a comprehensive safe organizations plan that includes prevention, intervention, crisis response, and recovery.</p>	<p>satisfy the component as defined.</p> <p>The administrator/leader fails to adhere to a comprehensive safe organizations plan in one or more of the following: prevention, intervention, crisis response or recovery.</p>	<p>process for revisiting the organization safety plan or does not follow revised plans.</p> <p>The administrator/leader lacks a process to collect data on the effectiveness of the organization safety plan that includes prevention, intervention, crisis response, and recovery or fails to contribute feedback when requested or required.</p>	<p>reviews, analyzes and adjusts organization safety and discipline plans based on organization data, crisis feedback, and current regulations/mandates or contributes feedback when requested or required.</p> <p>The administrator/leader maintains and creates open communication processes that allow for proactive identification and intervention of potential incidents or contributes to the communication when requested or required.</p> <p>The administrator/leader communicates to stakeholders regarding safety issues in a clear, appropriate, and timely manner when applicable and appropriate.</p>	<p>The administrator/leader incorporates active involvement of various safety agencies in the development, implementation, and evaluation of the comprehensive safe organizations plan or contributes to the collaboration in a substantial way.</p>

Domain 3: Service Leadership				
Leaders of an organization ensure that quality service and support is consistently the focus of the organization. All actions that occur within the organization are grounded in cultivating a culture of service that is both proactive and responsive to relevant, current needs of all stakeholders.				
Component	Failing	Needs Improvement	Proficient	Distinguished
<p>3a: Responsive and Results Oriented:</p> <p>The administrator/leader provides responsive, results-oriented services that are valued for helping clients meet their needs and internal staff improve and quantified by performance data.</p>	<p>The administrator/leader fails to satisfy the component as defined.</p> <p>The administrator/leader fails to be responsive to internal staff and/or client needs and does not use data for defined purposes.</p>	<p>The administrator/leader inconsistently responds to clients or rarely supports internal staff to develop results oriented services.</p>	<p>The administrator/leader consistently responds to client needs and provides leadership for internal staff to develop results oriented services.</p> <p>Data is used to support the value of the service and performance data is consistently monitored.</p>	<p>... and new services are developed or reinvented proactively to meet needs of clients before requested and provide results that meet client expectations.</p>
<p>3b: Empowers Staff to be Innovative:</p> <p>The administrator/leader cultivates and empowers all staff to develop relevant and innovative programs and services that are competitive in today's marketplace.</p>	<p>The administrator/leader fails to satisfy the component as defined.</p> <p>The administrator/leader fails to cultivate or empower staff resulting in a lack of innovative program development and/or are not in line with competitors.</p>	<p>The administrator/leader lacks leadership to consistently empower staff resulting in sporadic or infrequent development of services that are not competitive with other options.</p>	<p>The administrator/leader consistently cultivates and empowers staff to develop relevant and innovative programs and/or services that are priced balanced between quality and cost.</p>	<p>... and are a result of collaboration across departments and/or with external clients and/or agencies.</p>
<p>3c: Fosters a Culture of Service:</p> <p>The administrator/leader fosters a culture of service in all it does.</p>	<p>The administrator/leader fails to satisfy the component as defined.</p> <p>The administrator/leader fails to be service oriented and lacks the focus on the purpose of a service agency.</p> <p>Negative client feedback is frequent.</p>	<p>The administrator/leader lacks leadership to foster a culture of service with staff.</p> <p>Service to clients is sporadic, infrequent, untimely and/or lacks quality.</p> <p>Negative client feedback exists.</p>	<p>The administrator/leader fosters a culture of service with staff which results in a collective effort to consistently meet client needs.</p> <p>Service to clients is honest, timely and of a quality consistent with client needs.</p> <p>Positive feedback is received from clients through existing feedback conduits.</p>	<p>... and clients are systematically involved in assisting the administrator/leader in assessing the quality and effectiveness of the service(s) provided.</p> <p>Positive feedback is consistently received through existing feedback conduits and/or unsolicited.</p>
<p>3d: Leads Division/Individual Improvement Goals:</p> <p>The administrator/leader develops, executes, monitors, and evaluates division/individual goals that</p>	<p>The administrator/leader fails to satisfy the component as defined.</p> <p>The administrator/leader fails to develop, execute, monitor and/or evaluate division/individual goals</p>	<p>The administrator/leader develops, executes, monitors and/or evaluates division/individual goals; however, one or more components lack clear and consistent processes and systems to meet expectations.</p>	<p>The administrator/leader develops division/individual goals, as well as establishes clear and consistent processes and systems to:</p> <ul style="list-style-type: none"> • Execute action steps towards those goals. 	<p>... and</p> <p>The administrator/leader incorporates principles of continuous improvement into daily practice to improve progress towards goals and plans proactively, which</p>

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Domain 3: Service Leadership				
Leaders of an organization ensure that quality service and support is consistently the focus of the organization. All actions that occur within the organization are grounded in cultivating a culture of service that is both proactive and responsive to relevant, current needs of all stakeholders.				
Component	Failing	Needs Improvement	Proficient	Distinguished
are aligned to UMASD's Vision and Comprehensive Plan.	through lack of effort or inability to perform the tasks or duties necessary.		<ul style="list-style-type: none"> • Monitor and evaluate progress toward achieving those goals. • Revise goals and outcomes based on data analysis 	positively impacts the organization's culture and exceeds expectations of service delivery.
<p>3e: Sets High Expectations for All Staff:</p> <p>The administrator/leader holds all staff accountable for setting and achieving rigorous performance goals.</p>	<p>The administrator/leader fails to satisfy the component as defined.</p> <p>The administrator/leader fails to hold all staff accountable for setting and achieving rigorous performance goals.</p>	The administrator/leader inconsistently holds all staff accountable for setting and achieving rigorous performance goals.	<p>The administrator/leader articulates a belief in high measureable goals for all staff.</p> <p>The administrator/leader leads organization efforts to set and monitor goals for all staff and establish safety nets for struggling staff.</p> <p>The administrator/leader holds every staff member responsible and accountable for ensuring achievement of the rigorous outcomes established for them.</p> <p>Achievement is celebrated and/or rewarded.</p>	<p>... and</p> <p>The administrator/leader models high expectations for staff and other stakeholders by systematically monitoring performance goals for all staff.</p> <p>Achievement is celebrated and/or rewarded routinely.</p>

Domain 4: Professionalism and Leadership				
Administrators/organization leaders promote the success of all including the positive interactions among stakeholders and the professional growth of staff by acting with integrity, fairness, ethically and taking ownership for his/her actions.				
Component	Failing	Needs Improvement	Proficient	Distinguished
<p>4a: Maximizes Professional Responsibilities Through Stakeholder Involvement and Engagement:</p> <p>The administrator/leader designs structures and processes, which result in stakeholder involvement and engagement, as well as support collective ownership of the organization.</p>	<p>The administrator/leader fails to satisfy the component as defined.</p> <p>The administrator/leader fails to design structures and processes, which result in a lack of stakeholder involvement and engagement.</p>	<p>The administrator/leader's efforts for stakeholder outreach do not result in meaningful support for the organization.</p> <p>The administrator/leader unilaterally designs structures and processes that result in limited involvement and/or engagement of stakeholders.</p>	<p>The administrator/leader creates systems and engages all stakeholders in a shared responsibility for organization success reflecting a collective vision of the organization.</p> <p>The administrator/leader collaboratively works to establish a culture that encourages and welcomes stakeholders and seeks ways in which to engage them in the work of the organization.</p>	<p>... and</p> <p>The administrator/leader proactively develops relationships with stakeholders so as to develop good will and garner fiscal, intellectual and human resources that support specific aspects of the organization's strategic intents and efforts.</p>
<p>4b: Shows Professionalism:</p> <p>The administrator/leader operates in a fair and equitable manner with personal and professional integrity.</p>	<p>The administrator/leader fails to satisfy the component as defined.</p> <p>The administrator/leader fails to display honesty in interactions with stakeholders.</p> <p>The administrator/leader fails to recognize client and/or internal staff needs and contributes to organization practices that result in some stakeholders being ill served.</p> <p>Ownership of actions is not evident.</p>	<p>The administrator/leader interacts honestly with stakeholders, but attempts to serve all groups are inconsistent.</p> <p>Ownership of actions is somewhat evident.</p>	<p>The administrator/leader articulates and demonstrates a personal and professional code of ethics.</p> <p>The administrator/leader displays high standards of honesty, integrity, and confidentiality in interactions with all stakeholders.</p> <p>The administrator/leader actively serves internal staff to ensure that all staff receive a fair opportunity to succeed.</p> <p>Ownership of actions is consistent and sometimes reflective.</p>	<p>... and</p> <p>The administrator/leader holds the highest standards of honesty, integrity, and confidentiality.</p> <p>The administrator/leader proactively serves stakeholders, seeking out resources when needed.</p> <p>The administrator/leader makes a concerted effort to challenge negative attitudes or practices to ensure that all stakeholders, within all groups, are honored by the organization.</p> <p>Ownership of actions is consistent and reflective.</p>
<p>4c: Supports Professional Growth:</p> <p>The administrator/leader supports continuous professional growth of self and others through practice and inquiry.</p>	<p>The administrator/leader fails to satisfy the component as defined.</p> <p>The administrator/leader fails to identify professional growth needs of self and others, which would positively impact the</p>	<p>The administrator/leader implements professional development inconsistently or may not be aligned with the needs of the organization.</p>	<p>The administrator/leader targets professional development toward the improvement of learning experiences, including quality of service delivery and the ability of staff to meet the needs of clients.</p>	<p>...and</p> <p>The administrator/leader ensures that professional development within the organization is aligned with organizational needs, while recognizing the unique</p>

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Domain 4: Professionalism and Leadership

Administrators/organization leaders promote the success of all including the positive interactions among stakeholders and the professional growth of staff by acting with integrity, fairness, ethically and taking ownership for his/her actions.

Component	Failing	Needs Improvement	Proficient	Distinguished
	culture and performance of the organization.		The administrator/leader plans and routinely participates in professional development focused on improving service delivery in the form of internal processes, programs and practices.	professional development needs required to meet the expectations of clients.