VIII.

CONFERENCE FOR-THE-RECORD
CONFERENCE-FOR-THE RECORD

Compliance with Labor Contracts
When an administrator determines that a conference-for-the-record is appropriate, it is most important that, prior to giving notice of the conference, the appropriate labor contract or Managerial Confidential Exempt agreements be thoroughly reviewed with regard to proceedings and applicable due process. (See checklist on page VIII3)

Before the Conference
Absent an emergency situation, written notification must be provided to the employee at least 2 days in advance of the conference. If the conference is an emergency, less than two days notice is allowable. The notice must direct the employee to attend the conference, indicate the date, time, and place; stipulate the subject(s) to be addressed; and cite the employee's right to representation. By employee signature, or that of a witness, proof of receipt should be obtained. See pages VIII-5 through VIII-8 for a template and samples. Reminder: A conference-for-the-record is fact-finding in nature, not disciplinary in itself.

The conference must be carefully planned, anticipating possible reactions on the part of the employee and/or the union representative(s). This planning should also include duplication of any documents and/or materials to be discussed at the conference.

During the Conference
In all conferences, the administrator must have another member of the administrative staff present or request assignment of one for the conference. This administrative staff member's role should be carefully explained to him/her well in advance of the conference. In addition to being a witness to the proceedings, the administrative staff member can help with note-keeping and participate in the conference as deemed appropriate by the administrator. Other than a union representative, no member of another bargaining unit may be present. It is vital that notes be kept on the proceedings of the conference. The administrator must control the pace of the conference so that every point made is understood by all present and fully recorded in his/her notes.

During the conference, the administrator must carefully and systematically review the notification procedures, reason(s) for the conference, right to union representation (especially if none is present), and the investigative findings. Review of all prior communications (formal and informal) will serve to put the formal stage of communications into context; also, it will permit these to be included in the summary as official actions of record. While the conference is a good-faith effort for mutual communication, the administrator must, at all times, maintain control of the proceedings.

If during the conference, there is a need for a directive, it is vital that there be no question as to the directive’s intent or meaning. Make sure that the language is clearly understood by all. Tell the employee at this time that an immediate follow-up memorandum to him/her will record the proceedings of the conference, any related directives, and established timeframes. Administrative directives must clearly stipulate what not to do as well as what to do.

After the Conference
The conference summary must reflect accurately the proceedings of the conference, including resources assigned and those requested by the employee and/or union representatives present. Again, make sure that the directives are explicit and easily understood in the memorandum. When ready, and/or available, the memorandum should be signed and dated by the employee to acknowledge receipt and then should be placed in the worksite personnel file. If the employee refuses to sign the memorandum, the administrative witness must attest to that fact on the memorandum. See pages VIII-13 through VIII-16 for a template.

If the conference results in a need for the issuance of a reprimand, all of the aforementioned factors should be carefully considered and implemented. Pursuant to a good-faith regard to the employee's statements, the reprimand should be prepared and submitted to the employee for signature after the time of the conference and the employee must sign as received. If the employee refuses to sign, receipt of the document by the employee must be witnessed and dated by an administrator other than the person who conducted the conference. The Letter of Reprimand is maintained in the worksite personnel file; however, reprimands issued as a result of investigative cases, i.e., Administrative Review, GIU, or CIU are maintained in the OPS File, not in the school site personnel file. See page VIII-16 for sample.
If the performance and/or investigative issues which are the subject of the conference have risen to the level of being discussed at the monthly Office of Professional Standards meeting, provide a copy of the conference notification, summary, reprimand, and any other related material.

CONFERENCE-FOR-THE-RECORD
PROCEDURES CHECKLIST

NOTICE:

1. Obtain the employee’s signature on the conference-for-the-record notification at least two days prior to the conference. Include date, time, and location, as well as the topics to be covered at the conference. If an emergency situation exists, contact the Regional Center Administrative Director regarding scheduling an emergency conference-for-the-record.

2. Indicate the right to have union representation if they are a union member, or the right to have up two representatives if they are not a union member.

CONFERENCE PROCEDURES

1. Confirm awareness of union representation and note where representation is not chosen. If an employee is not a union member, he/she is entitled to up to two representatives.

2. Re-state the topics to be covered at the conference, as specified on the notice.

3. Review all formal and informal communications pertaining to the issues addressed at the conference.

4. Review all documentation pertaining to the subject of the conference.

5. Listen to objections/responses, and record them.

6. **Respond to objections without debate.**

7. Keep on task.

8. Be positive.


10. Record efforts by the employee, as well as counseling and assistance by the supervisor.

11. Explain options and requirements.

12. **Note effects and impact of the employee’s actions on the worksite and school system.**


14. State actions to be taken and timeframes, as applicable.

POST-CONFERENCE PROCEDURES

1. Prepare written summary of the conference-for-the-record.

2. Give one copy to the employee.

3. **Obtain the employee’s signature acknowledging receipt and date on the written summary.**

4. Place signed copy in the worksite personnel file (only if CFR is not related to an investigative issue)
5. Calendar time frames and deadlines for follow-up actions.

**TEMPLATE**

**NOTICE FOR CONFERENCE-FOR-THE-RECORD**

**MEMORANDUM**

Date___________________

TO: ____________________________________ (Employee Name)  Emp.#________

FROM: ____________________________________ (Principal/Supervisor)

____________________________________ (Work Location)

**SUBJECT: CONFERENCE-FOR-THE-RECORD**

You are directed to report for a conference in the principal/supervisor's office on
______________________, at _________a.m./p.m.
(Date) (Time)

This meeting is held in accordance with

_____ Article XI, Section 1 of the AFSCME Contract, and
_____ Article XI, Section 1 of the DCSMEC Contract, and
_____ Article X, Section 1 of the FOP Contract, and
_____ Article XXI, Section 1 of the United Teachers of Dade (UTD) Contract, and
_____ Article VII, Section 1 of the Dade County School Administrators’ Association (DCSAA)
_____ Classification and Compensation Plan for Confidential Exempt Personnel, Article V

and will address:

_____ Investigative Report: ___________________ , concerning your non-compliance with
Miami-Dade County School Board Policy (ies)______________________________,
_____ non-compliance with site directives regarding ____________________________,
_____ performance related issues,
_____ attendance-to-date,
_____ other ____________________________________,

_____ a review of the record, and
_____ your future employment status with Miami-Dade County Public Schools.

_____ You are contractually entitled to have up to two member advocates from the
_____ UTD Union.
_____ You are contractually entitled to have up to two bargaining agent representatives from the
_____ AFSCME Union.  _____ DCSMEC Union.
_____ You are contractually entitled to have representation from the
_____ FOP Union.  _____ DASA Organization.  _____ DCSAA Organization.

_____Confidential Exempt Steering Committee

**If you are not a union member, you are entitled to have up to two representatives.**

_____ Failure to attend this conference will not preclude it from taking place or disciplinary action
from ensuing.

cc: ___________________________ Superintendent, Region/District
___________________________ Administrative Director, OPS
___________________________ Administrative Director, Region/District
___________________________ District Director, OPS
___________________________ (Union)

(Do not include titles, only names of designated individuals)

I AM IN RECEIPT OF THIS MEMORANDUM.
MEMORANDUM

Date ______________

TO: Mr. William O. Knight, Assistant Principal

FROM: Leslie B. Goode, Principal
Palm Lake Middle School

SUBJECT: CONFERENCE-FOR-THE-RECORD

You are directed to report for a conference in the principal's office on ___________ at ___ (a.m./p.m.).

This meeting is held in accordance with Section C-3 of the Manual of Procedures for Managerial Exempt Personnel (MEP) and will address your: (attendance-to-date), (performance assessments-to-date), (___________________), (_______________), (___________________), a review of the record, and your future employment status with Miami-Dade County Public Schools.

Failure to attend this conference will not preclude it from taking place or disciplinary action from ensuing.

You are contractually entitled to have representation from the Dade Association of School Administrators (DASA) present at this conference. If you are not a union member, you are entitled to have up to two representatives.

cc: Superintendent, Region/District
    Administrative Director, OPS
    Administrative Director, Region/District
    DASA or DCSAA Representative
(Do not include titles, only names of designated individuals)

I AM IN RECEIPT OF THIS MEMORANDUM.

__________________________________  ________________
Employee Signature  Date
MEMORANDUM

Date________________

TO: Jane Doe, Teacher

FROM: Ulysses R. Wright, Principal
Pine Valley High School

SUBJECT: CONFERENCE-FOR-THE-RECORD

You are directed to report for a conference in the principal’s office on __________ at ____ (a.m./p.m.).

This meeting is being held in accordance with Article XXI, Section I of the United Teachers of Dade Contract and will address your (attendance-to-date), (performance assessments-to-date), ________, ________, ________, a review of the record, and your future employment status with Miami-Dade County Public Schools. You are contractually entitled to have up to two union representatives from the UTD Union present at this conference. If you are not a union member, you are entitled to have up to two representatives.

Failure to attend this conference will not preclude it from taking place or disciplinary action from ensuing

cc: ______________________ Superintendent, Region/District
________________________ Administrative Director, OPS
________________________ Administrative Director, Region/District
________________________ District Director, OPS
________________________ United Teachers of Dade
(Do not include titles, only names of designated individuals)

I AM IN RECEIPT OF THIS MEMORANDUM.

_________________________ _______________________
Employee Signature       Date

VIII-7
MEMORANDUM

TO: John Doe, Custodian I
FROM: Joseph J. Doe, Principal
Pine Valley High School

SUBJECT: CONFERENCE-FOR-THE-RECORD

You are directed to report for a conference in the principal’s office on ___________ at ____ (a.m./p.m.).

This meeting is being held in accordance with Article XI, Section 1 of the AFSCME Contract and will address your (attendance-to-date), (performance-related issues), ______________, a review of the record, and your future employment status with Miami-Dade County Public Schools. You are contractually entitled to have up to two bargaining agent representatives from the AFSCME Union present at this conference. If you are not a union member, you are entitled to have up to two representatives.

The successful resolution of these issues is of paramount importance to Miami-Dade County Public Schools. Therefore, your attendance at the conference is mandatory and will provide evidence of our continuing efforts to counsel you. Failure to attend this conference will not preclude it from taking place or disciplinary action from ensuing.

cc: ______________ Superintendent, Region/District
__________ Administrative Director, OPS
__________ Administrative Director, Region/District
__________ District Director, OPS
__________ AFSCME
(Do not include titles, only names of designated individuals)

I AM IN RECEIPT OF THIS MEMORANDUM.

__________________________________           _____________________________
Employee Signature                                                Date
PROCEDURES FOR WRITTEN SUMMARY OF CONFERENCE-FOR-THE-RECORD

TIME AND SUBSTANCE OF SUMMARY:

1. Prepare the summary within reasonable timeframe.
2. State the place, date, and time of the conference.
3. List the participants, titles, and affiliation(s), as applicable.
4. Cite the topics, as noted on the notice of the conference.
5. State notification of right of union representation and decision of employee not to have representation, if applicable.
6. Note contract status and service history of employee.
7. Discuss all informal communication and written documentation given to, and reviewed with, the employee.
8. Record employee’s awareness of governing rules, regulations, and procedures, including receipt of documents.
9. Note any connection(s) between the employee’s behavior/actions to prior warning(s) and/or discipline.
10. Note any connection(s) between the employee’s behavior/actions to prior employment decisions (reappointment, suspension, dismissal).
11. Note objections, alternate opinions, direct challenges, bases, and sources.
12. State clearly and precisely any warning, admonition, directive, or reprimand (if applicable).
13. Point out the implications and consequences of any recurring inappropriate conduct, unlawful actions or unprofessional behavior.
14. Note any and all pending determinations that may lead to further disciplinary action(s).
15. Note that employee’s signature acknowledges only receipt, not agreement.
16. Note that employee was notified of his/her right to append his statement/response to the summary.

DELIVERY OF SUMMARY:

1. Obtain the employee’s signature and date on the summary acknowledging receipt.*
2. Give a copy of the signed summary to the employee.
3. File a signed copy in the worksite personnel file.
4. File a copy, and support documentation, with any disciplinary recommendation in the worksite personnel file.

* CFR documentation pertaining to investigative issues is forwarded to OPS and placed in the OPS File, not in the worksite personnel file.

**NOTE:** If employee refuses to sign for receipt of document, make a note of the refusal on the document, obtain the signature of the administrative witness, and date the document.
MEMORANDUM

TO: ___________________________, Employee
Emp. # 000039

FROM: ___________________________, Principal/Supervisor
_______________________________, School/Work Location

SUBJECT: SUMMARY OF CONFERENCE-FOR-THE-RECORD

A conference-for-the-record was held with you in my office on (Day of the Week), (Date and Time).

_____ You reported that the United Teachers of Dade (UTD)/Dade Association of School Administrators (DASA)/Dade County School Administrators' Association (DCSAA)/American Federation of State, County, and Municipal Employees (AFSCME)/Dade County School Maintenance Employee Committee (DCSMEC)/Fraternal Order of Police (FOP)/Confidential Exempt Steering Committee declined to represent you since you are not a member.

Present at the conference were: ___________________________, Assistant Principal; ___________________________, Principal; and ___________________________, DASA/DCSAA/AFSCME/DCSMEC/Confidential Exempt Steering Committee Representative(s) or UTD Union Representative(s).

The conference was held to address: (must be same language used in Notification of CFR)

_____ Investigative Report Case Number: ____________ concerning ____________;
_____ your non-compliance with Miami-Dade County School Board Policy (ies);

- School Board Policy 1121.01, 3121.01, or 4121.01, Employment Standards and Fingerprinting.
- School Board Policy 1124, 3124, or 4124, Drug-Free Workplace.
- School Board Policy 1129, 3129, or 4129, Conflict of Interest.
- School Board Policy 1139, 3139, or 4139, Educator Misconduct
- School Board Policy 1210, 3210, or 4210, Standards of Ethical Conduct.
- School Board Policy 1210.01, 3210.01, or 4210.01, Code of Ethics.
- School Board Policy 1213, 3213, or 4213, Student Supervision and Welfare.
- School Board Policy 1217, 3217, or 4217, Weapons.
- School Board Policy 1231, 3231, or 4231, Outside Activities of Administrators, 3231, Outside Activities of Staff, or 4231, Outside Activities of Support Staff.
- School Board Policy 1232, 3232, or 4232, Political Activities.
- School Board Policy 1362, 3362, or 4362, Anti-Discrimination/Harassment.
- School Board Policy 1362.02, 3362.02, or 4362.02, Anti-Discrimination/Harassment Complaint Procedures.
- School Board Policy 1380, 3380, or 4380, Threatening Behavior Toward Staff Members.
- School Board Policy 1430, 3430, or 4430, Leaves of Absence.
- School Board Policy 5630, Corporal Punishment and Use of Reasonable Force.
- School Board Policy 7540.04, Staff Network and Internet Acceptable Use and Safety.
- School Board Policy 8600, Transportation.

VIII-10
School Board Policy 8606, Restrictions on Use of Communication and Transmission Devices on Board-Owned Vehicles.

School Board Policy 8670, Post Trip Inspections of School Buses.

____ noncompliance with worksite directives regarding __________;
____ other __________;
____ a review of the record,
____ and your future employment status with Miami-Dade County Public Schools (M-DCPS).

Service History

As you reported in this conference, you were initially employed by Miami-Dade County Public Schools as a ______ Position_______ on _____ Date_______, and you were assigned to _____ Location School where you remained through _________.

To date, you have worked at the following locations (in the identified positions):

<table>
<thead>
<tr>
<th>Site(s)</th>
<th>Service Dates</th>
<th>Positions (if varying)</th>
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Conference Data Reviewed

A packet of written documents was provided to you and your Bargaining Agent Representative(s) prior to the conference for review in its entirety.

A review of the record included reference to the following issues:

X (Date)

X (Date)

X (Date)

X (Date)

X (Date)

X (Date)

☐ You were advised that the above-cited violation was determined as Probable Cause by Investigative Report, Case # ___-____ conducted by __________.

Copies of the aforementioned documents were presented to and reviewed with you. I asked you if you understood the seriousness of this matter. You replied that you did. I provided you the opportunity to respond. You indicated that ________________________________

______________________________

______________________________

______________________________

VIII-11
**Action Taken**

You were advised of the high esteem in which M-DCPS employees are held and of the District’s concern for any behavior which adversely affects this level of professionalism.

You were reminded of the prime directive to maintain a safe learning environment for all students.

You received a supervisory referral to the District’s support referral agency. The following directives are herein delineated which were issued to you during the conference.

1. 
2. 
3. 
4. 

These directives are in effect as of the date of the conference and will be implemented to prevent adverse impact to

students and their academic progress; (instructional)

the operation of the work unit and to the services provided to students; (non-instructional)

ensure continuity of the education program.

Other: _________________________________________________________________

Noncompliance with these directives will necessitate further review for the imposition of additional disciplinary measures and will be deemed as insubordination.

During the conference, you were provided with a copy of:

- School Board Policy 1121.01, 3121.01, or 4121.01, Employment Standards and Fingerprinting was discussed with the employee. A copy of this policy was provided to the employee and a directive was issued to comply.
- School Board Policy 1124, 3124, or 4124, Drug-Free Workplace was discussed with the employee. A copy of this policy was provided to the employee and a directive was issued to comply.
- School Board Policy 1129, 3129, or 4129, Conflict of Interest was discussed with the employee. A copy of this policy was provided to the employee and a directive was issued to comply.
- School Board Policy 1139, 3139, or 4139, Educator Misconduct was discussed with the employee. A copy of this policy was provided to the employee and a directive was issued to comply.
- School Board Policy 1210, 3210, or 4210, Standards of Ethical Conduct was discussed with the employee. A copy of this policy was provided to the employee and a directive was issued to comply.
- School Board Policy 1210.01, 3210.01, or 4210.01, Code of Ethics was discussed with the employee. A copy of this policy was provided to the employee and a directive was issued to comply.
School Board Policy 1213, 3213, or 4213, Student Supervision and Welfare was discussed with the employee. A copy of this policy was provided to the employee and a directive was issued to comply.

School Board Policy 1217, 3217, or 4217, Weapons was discussed with the employee. A copy of this policy was provided to the employee and a directive was issued to comply.

School Board Policy 1231 Outside Activities of Administrators, 3231, Outside Activities of Staff, or 4231, Outside Activities of Support Staff was discussed with the employee. A copy of this policy was provided to the employee and a directive was issued to comply.

School Board Policy 1232, 3232, or 4232, Political Activities was discussed with the employee. A copy of this policy was provided to the employee and a directive was issued to comply.

School Board Policy 1362, 3362, or 4362, Anti-Discrimination/Harassment was discussed with the employee. A copy of this policy was provided to the employee and a directive was issued to comply.

School Board Policy 1362.02, 3362.02, or 4362.02, Anti-Discrimination/Harassment Complaint Procedures was discussed with the employee. A copy of this policy was provided to the employee and a directive was issued to comply.

School Board Policy 1380, 3380, or 4380, Threatening Behavior Toward Staff Members was discussed with the employee. A copy of this policy was provided to the employee and a directive was issued to comply.

School Board Policy 1430, 3430, or 4430, Leaves of Absence was discussed with the employee. A copy of this policy was provided to the employee and a directive was issued to comply.

School Board Policy 5630, Corporal Punishment and Use of Reasonable Force was discussed with the employee. A copy of this policy was provided to the employee and a directive was issued to comply.

School Board Policy 7540.04, Staff Network and Internet Acceptable Use and Safety was discussed with the employee. A copy of this policy was provided to the employee and a directive was issued to comply.

School Board Policy 8600, Transportation was discussed with the employee. A copy of this policy was provided to the employee and a directive was issued to comply.

School Board Policy 8606, Restrictions on Use of Communication and Transmission Devices on Board-Owned Vehicles was discussed with the employee. A copy of this policy was provided to the employee and a directive was issued to comply.

School Board Policy 8670, Post Trip Inspections of School Buses was discussed with the employee. A copy of this policy was provided to the employee and a directive was issued to comply.

How to Use Common Sense and Professional Judgment to Avoid Legal Complications in Teaching, was discussed with the employee and a copy of this document was given to employee and directed to comply.

Common Sense Suggestions for Non-Instructional Personnel was discussed with the employee and a copy of this document was given to employee.

State Board of Education Rule 6B-1.001, FAC, and State Board of Education Rule 6B-1.006, FAC. The Code of Ethics and the Principles of Professional Conduct of the Education Profession in Florida was issued and reviewed with the employee and directed to comply.

The employee was made aware of the District's support referral agency.

The employee was issued a supervisory referral to the District's support referral agency which is attached.

☐ Other: ____________________________________________________

You were advised to keep the information presented in this conference confidential and not discuss this with students and staff.
Action To Be Taken

You were advised that the information presented in this conference, as well as subsequent documentation, would be reviewed with the Administrative Director in the Office of Professional Standards, the Region Superintendent and Administrative Director of __________Region, and Administrative/District Director of OPS.

The following actions will be taken by this administrator:

____ You were advised of the issuance of a letter of reprimand.

____ You were directed to adhere to the specific directives issued to you in the conference.

____ You were notified that all investigative data will be transmitted to Professional Practices Services (PPS), Florida Department of Education (FDOE), for review and possible licensure action by the Educational Practices Commission (EPC). (Applies only to employees holding Department of Education Certificates.)

____ Other

Any noncompliance with these directives will compel district disciplinary measures.

You were told that any recurrences of this violation will result in (further) disciplinary action. This administrator asked you if you had any further comments. Your response was ______________. The conference was concluded at __Time__.

(Please be aware/You were apprised) of your right to clarify, explain, and/or respond to any information recorded in this conference by this summary, and to have any such response appended to your record.

cc: __________

I AM IN RECEIPT OF THIS MEMORANDUM.

Employee Signature ______________________ Date ______________________

NOTE: If the employee is absent for a prolonged time period, send the summary by both U.S. First Class and Certified Mail Return Receipt Requested. Indicate that you have done so on the summary. When it is returned to you, retain the green receipt of certified mail for your records or obtain confirmation of delivery from the Postal Service website (www.usps.com).

A conference-for-the-record must be conducted PRIOR to any disciplinary action, including a written REPRIMAND.
MEMORANDUM

TO: ___________________________, Employee
FROM: ___________________________, Principal/Supervisor

SUBJECT: REPRIMAND

On (Date) ____, you (Briefly indicate circumstances of inappropriate action(s)), including place and subject. Probable Cause was found for this infraction by the (General Investigative Unit/ Civilian Investigative Unit/ Administrative Review), Case# ______________. These actions were in violation of School Board Policy(ies) ___________________________.

It is your responsibility as a Miami-Dade County Public School (M-DCPS) employee to conduct yourself in a manner that reflects credit upon yourself and the district. Therefore, you are hereby officially reprimanded for the infraction detailed above.

You are directed to: (repeat all directives issued in CFR).

1.

2.

Any recurrence of the above infraction may lead to further disciplinary action.

I AM IN RECEIPT OF THIS MEMORANDUM.

_________________________________  __________________________
Employee Signature  Date

cc: _____________________Superintendent, Region/District
    _____________________Administrative Director, OPS
    _____________________Administrative Director, Region/District
    _____________________District Director, OPS
(Do not include titles, only names of designated individuals)
INSTRUCTIONAL MID-YEAR CONFERENCE-FOR-THE-RECORD
OUTLINE FOR CONTINUING CONTRACT TEACHERS

Employees whose performance is rated Below Standards or who have demonstrated noted deficiencies must participate in a mid-year conference-for-the-record. This conference is to be conducted by the principal or site supervisor in December.*

As a result of the conference-for-the-record, the following data must be submitted to the Region/District Office no later than the last workday in December before winter recess.

1. Notification of conference-for-the-record to the employee.

2. Summary of conference-for-the-record.

At the conference, the principal/site supervisor is to:

1. Review the performance assessments-to-date.

2. Delineate assistance given by administration to remedy indicators of teaching and learning that do not meet standards (Region/District supervisory assistance, inservice workshops, website materials).

3. Emphasize the positive elements of supervision yielding improved performance.

4. Apprise instructional personnel of the possible end-of-year summative evaluation decisions and frozen salary status if performance remains below standards.

5. If appropriate, recommend the employee to the District’s Support Referral Agency for problems of stress, burnout, or family concerns through a supervisory referral to the District’s Support Referral Agency.

Additional assistance is available from Region and District offices.

*Note: If performance deficiencies are identified after December, a conference-for-the-record must be conducted with teachers who hold continuing contracts following the report of Below Standards and must contain the components of the mid-year conference.
MEMORANDUM

TO: ___________________________, Employee Name

FROM: ___________________________, Principal/Supervisor

___________________________, School/Work Location

SUBJECT: CONFERENCE-FOR-THE-RECORD SUMMARY

Overview:
On __________(date), a conference-for-the-record was held with you to address: (select one or more)
(must be the same language used in Notification of CFR)

- performance assessments-to-date
- non-compliance with Improvement Plan (IP) activities regarding: (select one or more)
- discipline of students
- fulfillment of prescriptive activities
- meeting timelines
- lesson plans
- maintenance of accurate records
- discuss parent complaints (delineate here, if not formalized previously)
- investigative issues (refer to any pending case or substantiated personnel report)
- excessive absences
- a review of the record
- and future employment status with Miami-Dade County Public Schools
- professional development requirements
- and future employment status with Miami-Dade County Public Schools

In attendance were             (principal)       ,       (second administrator)      ,      (member advocate[s]).

Professional Service History: (optional)
You have been employed with Miami-Dade County Public Schools since        (employment date) ,
and at this school site since             (site employment date)     .   You currently hold a continuing
contract with the District and a teaching certificate in the following area(s):  (list area(s)), which is
valid through June 30, 20__.

Conference Data Reviewed:
Your performance during the __________(year-year)___ school year includes:

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<tr>
<th>Observation Dates</th>
<th>Indicators Below Effective Standards</th>
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VIII-17
Assistance Provided:
An Improvement Plan (IP) was provided to remedy performance standards that are unsatisfactory. Additionally, the following support was provided to you to improve teaching/learning:
(Select one or more)

___ release time to observe other teachers
___ inservice workshops (specify)
___ district/supervisory assistance
___ teacher education courses (specify)
___ resources materials (specify)
___ demonstration lessons
___ referral to District support agency

The IPEGS Summative Performance Evaluation for ___(year - year)___ was rated Unsatisfactory in the following areas: (list areas)

If performance standards are not met, the following will occur: (select one)

___ Recommendation for frozen salary status and carry-over IP
___ Recommendation to not re-employ
___ Performance probation carry-over
___ Recommendation to the District for termination of employment

Specific Performance Issues:
(Insert pertinent sections from below as necessary)

• Compliance:
You have been advised that an IP was provided to remedy performance standards of teaching and learning that are not satisfactory. IPs are contractual obligations (reference Article XXI, M-DCPS/UTD Contract). You are non-compliant with IP timelines.

The IP timeline for the Record of Observed Deficiencies issued on ___(date)___ was due on ___(date)__. You did not submit the activities/materials in a timely manner and were duly notified of your requirement to comply.

• Complaints:
Complaints have been forwarded to this administrator or the school administration and transmitted to you as stipulated in the M-DCPS/UTD Contract, Complaint Section [Article XXI, The complaints received include: (select one or more)

___ poor relationship with students
___ failure to maintain safe learning environment
___ excessive absences
___ inconsistent grading policy
___ inequitable treatment of students
___ poor communication with parents
___ failure to maintain designated records
___ inappropriate comments to students
___ altercations with other staff members
___ other (explain)

Conferences have been conducted with you to address these concerns on ___(list dates)___, and directives were issued to you to promote your improved performance. (If specific directives were given, delineate them here.)
• **Attendance:**

   It has been determined that you have been excessively absent during the __ (year - year) __ school year. To date, you have been absent __(#)__ days. The following directives were issued to you during the conference, concerning future absences:

   1. Intent to be absent must be communicated directly to the designated administrator.

   2. Absences for illness must be documented by your treating physician and a written medical note presented to the designated administrator upon your return to the site. **AND/OR**

   3. Site procedures for provision of lesson plans and materials for the substitute teacher when absent must be adhered to in the event of an absence from the worksite.

If it is determined that future absences are imminent, leave must be considered and procedures for Board-approved leave implemented.

These directives are in effect as of the date of the conference and will be implemented to:

(select one or more)

- [ ] maintain good attendance
- [ ] maintain support services to students
- [ ] continue the academic progress of students
- [ ] continue the effective operation of the worksite
- [ ] ensure continuity of the educational program.

Non-compliance with these directives will engender further disciplinary measures.

**Employee Responses:**

You were provided with an opportunity to respond to:

(Include employee responses or remarks here.)

**Concluding Remarks:**

During the conference, you were provided a copy of School Board Rule Policy 3210, Standards of Ethical Conduct, and Chapter 6B-1.001(3), Code of Ethics of the Principles of Professional Conduct of the Education Profession of Florida. You were advised of the high esteem in which teachers are held and of the District's concern for any action which adversely affects this level of professionalism.

Please be advised that the school administration is available to assist you in your professional development and will make every effort to accommodate your requests related to performance improvement.

You are hereby notified of your right to clarify, explain, and/or respond to any information recorded in this conference by this summary, and to have such response appended to your record.

**cc:**

_____________________________ Superintendent, Region/District
_____________________________ Administrative Director, OPS
_____________________________ Administrative Director, Region/District
_____________________________ District Director, OPS

(Do not include titles, only names of designated individuals)

I AM IN RECEIPT OF THIS MEMORANDUM

_________________________________     _____________________________
Employee Signature    Date
MEMORANDUM

Date_______________________

TO: __________________________(Employee)

FROM: __________________________(Principal)

__________________________(Site)

SUBJECT: CONFERENCE DATA DELINEATED FOR

____MID-YEAR CONFERENCE
____UNSATISFACTORY END OF YEAR
____SUMMATIVE PERFORMANCE
EVALUATION

This memorandum takes the place of the conference-for-the-record that would have been conducted, had you not been on leave/absent, to address the unacceptable performance standards identified this school year.

During the __year - year__ school year, assessment of your performance was as follows:

<table>
<thead>
<tr>
<th>Observation Date</th>
<th>Unsatisfactory Standards</th>
<th>IP Timeline</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

____ Please be advised that the assessment process will continue upon your return to the worksite to remedy indicators of teaching and learning that do not meet standards.

____ Please be advised that the assessment process will continue upon your return to the worksite to remedy indicators of teaching and learning that do not meet standards and, as such, the annual evaluation is rated unacceptable in:

______________________________________________________________________________

______________________________________________________________________________

____ Please be advised that the enclosed employment action has been recommended because your performance remains Below Standards at this time.

____ The End of Year Summative Performance Evaluation __(year)__ is enclosed for your signature. Please return a signed copy to me in the enclosed, stamped envelope and retain a copy.

A conference will be conducted upon your return to the worksite to clarify any concerns you may have.

Attachment(s)

cc: ___________________________ Superintendent, Region/District

_________________________ Administrative Director, OPS

_________________________ Administrative Director, Region/District

_________________________ District Director, OPS

(Do not include titles, only names of designated individuals)

Certified - Return Receipt Requested

US Mail

VIII-20
MEMORANDUM

TO: __________________(Principal/Site Administrator)
    __________________(School/Worksite)

FROM: __________________(Administrative Director)
    Office of Professional Standards

SUBJECT: DISCIPLINARY ACTION POST OPS CONFERENCE SITE DISPOSITION

CASE: __- _______
SUBJECT: PRELIMINARY PERSONNEL INVESTIGATION
SCHOOL BOARD POLICY (IES)
PROBABLE CAUSE

NAME: ________________________   EMPLOYEE # ________________
POSITION: ____________________
LOCATION: _________________

The Office of Professional Standards seeks to establish a final disposition for the above-indicated case.

Because the report references administrative action at the worksite which shall be sufficient to bring closure to the issue, your written implementation of actions related to the cited case must be reviewed with the Region/District Office and provided to this office.

This disciplinary action should include:

- Letter of reprimand
- Written directives as delineated in the conference-for-the-record (CFR).

The disciplinary actions should be forwarded to the Office of Professional Standards within 10 working days from the date of this memorandum, with a copy to the Region/District Office.

The disciplinary report is available for review in the Office of Professional Standards.

The investigative report is maintained in the Office of Professional Standards and is not to be placed in a site file.

Attachment - CFR Summary

cc: ________________________, Superintendent, Region/District
    ________________________, Administrative Director, OPS
    ________________________, Administrative Director, Region/District
(Do not include titles, only names of designated individuals)