

Performance PLANNER



MADE TO BE
EXCELLENT



School Goals

SUSTAINABLE GROWTH

Sustainable growth through strategic planning and optimizing resources in relationship to our budget. New student recruitment initiatives through community outreach, relationship building, demographic research and marketing through diverse mixed media.

RETENTION

Sustainably retaining students through high academic expectations, intervention, innovation, quality programs and collaboration. Staff retention through improvements and initiatives that increase oversight, accountability, professional development and support.

QUALITY PROGRAMS

Offer students innovative personalized programs that offer flexibility, leadership and independent learning. Develop and empower individual teams to deliver programs of integrity, accountability and compliance.

PROFESSIONAL DEVELOPMENT

Growing, enhancing and developing skills in our staff. Defining and demonstrating roles and responsibilities, identifying strengths and weaknesses. Providing methods of support including training and access to materials to enhance performance. Emphasizing how teamwork and using individual strengths contribute to success.

Dashboard

WHAT AREAS OF THE CA SCHOOL DASHBOARD AFFECT YOUR DEPT.?
WHAT IS IN YOUR CONTROL?

Below are the dashboard indicators

Suspension Rate

EL Progress

Graduation Rate

College & Career

Math

Local Climate Survey

ELA (English Lang. Arts)

Webinars on CA school dashboard

Parent & Family Engagement

Basics: Teachers, IFs, Facilities

Implementations of Academic Standards

Contributing to scoreboard data for renewal

GENERAL EDUCATION

- ELA (English Language Arts)
- Math
- Teachers (Student/Teacher Ratio, hiring, training)
- Implementation of Academic Standards (curriculum)
- TOR Training in areas of Parent and Family Engagement
- Student progress tracking in relationship to parent engagement
- PIN Follow Through



HIGH SCHOOL

- Webinars on CA school dashboard
- Contributing to scoreboard data for renewal
- College and Career (curriculum)
- Implementation of Academic Standards (curriculum)
- Parent and Family Engagement
- Local Climate survey
- Contributing to scoreboard data for renewal
- Graduation Rate



COUNSELING

- Graduation Rate
- College and Career
- Webinars on CA school dashboard, Contributing to scoreboard data for renewal
- Implementation of Academic Standards (grad requirements)
- Parent and Family Engagement
- Local Climate survey
- Webinars on CA school dashboard
- Contributing to scoreboard data for renewal



Dashboard

INTERVENTION

- Suspension Rate,
- EL Progress,
- Graduation Rate,
- College and Career,
- ELA,
- Math, Basics:
- Teachers,
- Instructional Funds,
- Facilities,
- Implementation of Academic Standards,
- Parent and Family Engagement,
- Local Climate survey,
- Webinars on CA school dashboard,
- Contributing to scoreboard data for renewal



OPERATIONS

- Implementation of Academic Standards
- Parent and Family Engagement
- Local Climate survey
- Webinars on CA school dashboard
- Contributing to scoreboard data for renewal



BUSINESS SERVICES

SPECIAL EDUCATION

- EL Progress
- Graduation Rate
- College and Career
- ELA (English Language Arts)
- Math
- Implementation of Academic Standards
- Parent and Family Engagement
- Contributing to scoreboard data for renewal



COMMUNITY

- EL Progress
- ELA (English Language Arts) Assessments
- Math Assessments
- Implementation of Academic Standards
- Parent and Family Engagement
- Local Climate survey
- Webinars on CA school dashboard
- Contributing to scoreboard data for renewal



ASSESSMENT

- EL Progress
- ELA (English Language Arts) Assessments
- Math Assessments
- Implementation of Academic Standards
- Parent and Family Engagement
- Local Climate survey
- Webinars on CA school dashboard
- Contributing to scoreboard data for renewal



What to do after goals

Why Goals?

A clear, concise relevant set of school goals will help to drive the most important initiatives for the schools. These goals will define ways in which departments and staff should stay on track to work toward common goals/ positive outcomes. Think of goals as a roadmap you can refer to, to help guide you toward the finish line; you may have to take a few alternative routes on your journey but the guide will help point you in the right direction.

Without goals and initiatives work can become messy, unfulfilling, redundant, and inefficient.

What to do after goals?

1. Review 2022/23 Goals
2. Review your Department Goals from last year to glean ideas from.
****Tip - Most goals shouldn't change dramatically from year-to-year.*
3. Brainstorm how your department facilitates support to the school in relationship to each goal.
4. Once you've reviewed the School Goals and brainstormed how your department contributes, create goals for your department and turn them into Human Resources.
5. Meet with your team members to discuss and present 2022-2023 School and Department Goals.
6. With your team, start to brainstorm individual goals and how they each support your department in relation to each goal.

3. Example:

1. School Goal: 1. Sustainable Growth: Sustainable growth through strategic planning and optimizing resources in relationship to our budget. New student recruitment initiatives through community outreach, relationship building, demographic research and marketing through diverse mixed media.
2. Department Goal : Sustainable Growth: Provide up-to-date and accurate financial staffing information/ data to the Business Services department for accurate budgeting. Support community outreach staff by providing them transparent expectations, desired outcomes and support their initiatives in any way required.

6. Example:

1. School Goal: 1. Sustainable Growth: Sustainable growth through strategic planning and optimizing resources in relationship to our budget. New student recruitment initiatives through community outreach, relationship building, demographic research and marketing through diverse mixed media.
2. Department Goal : Sustainable Growth: Provide up-to-date and accurate financial staffing information/ data to the Business Services department for accurate budgeting. Support community outreach staff by providing them transparent expectations, desired outcomes and support their initiatives in any way required.
3. Individual Goal: Sustainable Growth: Create monthly strategic staffing plan via google sheets to provide accurate financial staffing information/ data to the Business Services department for accurate budgeting. Create monthly "Get to Know" HR series to keep staff well informed on school Operations creating a positive, sustainable work environment.

What to do after goals

7. Build a timeline and indicate the due date for individual goals from your team members. *ToR's and Case Managers will receive one set of individual goals for all staff.*

8. Administrative staff, leadership and applicable management should be meeting regularly with team members to discuss progress in achieving goals, overall performance and attitude concerns.

9. Informal and formal employee assessments should be conducted once a year.

[Video Tutorial](#) 

Performance Timeline

REVIEWER.ORG 

ACTION	DUE DATE	DESCRIPTION
SCHOOL GOALS	07/30/2022	The schools overall set of goals developed to achieve success and streamline initiatives.
DEPT. GOALS - ROUGH DRAFTS / FINAL DRAFTS	09/16/2022	Using the school goals each department developed a set of goals on which they will individually support achieving overall goals.
INDIVIDUAL GOAL	09/23/2022	Using School and Department goals individual staff members created goals to contribute to achieving the overall goals. TOR and Sped Teachers all have the same set of goals.
TOR EVALUATION TRACKING SPREADSHEET, ERROR & ACHIEVEMENT FORM: Emailed to (departments) with instructions on how to complete	09/06/2022	ToR Evaluation Tracking Spreadsheet and Error & Achievement Form are two documents used to track and monitor the ongoing performance and progress of ToRs and other staff members. Submissions made on these forms are sent to supervisors and Admin to consult employees and HR and offer development opportunities and strategies.
FIRST SEMESTER GOAL CHECK IN & MID YEAR PEER ASSESSMENT (INFORMAL)	01/16 - 01/20/23	<ol style="list-style-type: none">1. TOR will meet with Regional Leaders and complete regional assessment forms.2. CM's will meet with the Lead CM and Program Specialist or leadership team member as assigned and review assessment form, goals and performance.3. All other staff will meet with supervisors to conduct informal midyear assessment. These semi annual evaluations will be a goal check in to identify areas of improvement. Assessments will be verbally reviewed and expectations re-defined.4. Administrators will review the assessment documents and schedule 1:1 with staff as applicable.
REGIONAL LEADER AND LEAD CM FINAL EVALUATION FOR TOR'S (FORMAL)	03/31/2023	Using the Regional Leader Assessment Form, Regional Leaders will Assess ToR's to manage and track improvement or decline in overall performance since the mid year assessment.
OBSERVATIONS FOR NEW HIRES AND STIPEND POSITIONS (HQT, RL, CL)	03/31/2023	New TORs will be formally observed and assessed based on the Observation/Coaching form where Victoria Firetag will record areas of strength and areas where TORs can improve.

Performance Timeline

ACTION	DUE DATE	DESCRIPTION
TOR EVALUATION TRACKING SHEET AND ERROR AND ACHIEVEMENT SUBMISSIONS DUE	05/12/2023	All applicable department leads will complete and submit "ToR Evaluation Tracking Sheet to contribute to overall TOR evaluation and collect data in performance
ANNUAL SELF-ASSESSMENT	05/13/2023	Each individual staff member will complete a self-assessment to indicate how they view their annual performance and goal achievement was.
ANNUAL EMPLOYEE ASSESSMENT	05/26/2023	Admin team will work with leadership and Regional Leaders to collaborate on staff annual assessments. Using informal mid-year assessments, Evaluation Tracking Form, E&A submissions and feedback on performance, AD's will conduct the final evaluation of staff members.
EMPLOYEE REVIEWS 1:1 (IF APPLICABLE)	05/28 - 06/02/23	Staff members with performance concerns, scheduled PIP's and non-renewal agreements will be notified via 1:1 meeting with supervisor and Human Resources.

OVERALL EMPLOYEE EVALUATIONS EMAILED TO EMPLOYEES BY END OF MAY

Standard ASSESSMENTS

- [Certificated ToR Self-Assessment](#)
- [Certificated SPED Leadership Employee Assessment](#)
- [Certificated SPED Case Manager Employee Assessment](#)
- [Certificated Admin Self-Assessment](#)
- [Certificated Leadership Employee Assessment](#)
- [Classified Self-Assessment](#)
- [Custom Assessment Request Form](#)



[VIDEO TUTORIAL - "PERFORMANCE MANAGEMENT BASICS AND YOUR TOOLKIT"](#) 

HR PERFORMANCE RESOURCES

LINKED



[Error & Achievement Form - ToRs](#)



[Error & Achievement Form - Sped Staff](#)



[Error & Achievement Form - Non-Teaching Staff](#)



[Error & Achievement Acknowledgment Form](#)



[Shout Outs](#)



[Evaluation Tracking Sheet](#)



[Performance Success Plan](#)



[Performance Improvement Plan](#)



[Performance Improvement Process](#)

INCLUDED

INSPIRE

FRISK

Conference Summary

Write-Up

PERFORMANCE PROCESS

AD's/ Managers can create team check-ins as they deem necessary with team members as team members and roles may require different levels of support and collaboration. Suggestion for check ins in relationship to goal achievement would be at the end of each semester and then again during the annual assessment period.

AD's/Managers should help individual team members in creating their goals especially if there are areas of immediate improvement they're aware of and need to begin tracking for performance improvement.

AD's/ Managers should use the ToR, Sped Staff, or Non-teaching staff Error & Achievement Form or Non-teaching staff Error & Achievement Form throughout the year to track any team member errors, performance mishaps and any positive achievement items.

If AD/Managers are frequently documenting error and performance items depending on the situation and severity of the issues that team member(s) can be placed on an Performance Improvement Plan or written up for poor behavior.

Typically, the first submission of an error form will be accompanied with a verbal warning, second error form submission accompanied with a write up and third & fourth submission is ground for write up, PIP and review for termination. If the situation is deemed applicable the team members can be terminated at any point within the process.

■ *Error Form Submission 1 = Verbal Warning*

■ *Error Form Submission 2 = Write Up or Conference Summary*

■ *Error Form Submission 3 = Write Up/ PIP of PSP*

■ *Error Form Submission 4= Write Up/ Review for Termination*

***** This is a suggested process for performance, employees can be released at any point if deemed necessary in an at-will organization.*

PERFORMANCE ISSUES PROCESS

- When an Error & Achievement form is submitted an alert will be sent to the admin team and HR. Admin and HR will then email employee to notify the employee of submission and offer solutions to improve behavior.
- All Error & Achievement submissions will be accompanied by a signed acknowledgement from the employee and the direct supervisor. The link to this acknowledgement can be found on the Error and Achievement Form and a link will also be provided in the email sent to the team member.
- During the first and second semester goal/performance checks AD/Managers should communicate and document all performance improvements suggested and discussed. Any error forms submitted during the first semester should again be discussed during these periods and status of improvement monitored.
- During the annual assessment period AD/Managers should reiterate all documented performance improvement items discussed during semester check ins and how progress was made to complete the year. AD/Managers will review the individual goals and discuss and document progress made, goals achieved and improvements that need to be made.

FRISK

The primary purpose of FRISK is to increase an evaluator's skill, knowledge and ability to address below-standard employee performance.

Many evaluators fear clear, honest direct communication with below-standard performing employees. As a result feedback is often replete with diluted assessments of performance problems. This indirect approach sends mixed messages and only increases the employees chance for failure.

Evaluators must provide early, ongoing, meaningful counseling and support to employees to promote success. Employees must be willing to conform to legitimate and reasonable performance standards set by management.

OBJECTIVES

- Effective Positive Change
- Develop common institutional language to establish uniform feedback.
- Promote employee accountability
- Ensure legally sufficient documentation

COMPONENTS

- Facts - describe the facts depicting the below standard performance
- Rule- identify the expectation or standard that should have been followed by the employee
- Impact- Describe the adverse impact of the employees substandard performance
- Suggestions/ Directions for Improvement- identify what the employee should do to improve or correct the substandard performance. Provide suggestions and directions for improvement
- Knowledge- Ensure the employee has the knowledge of applicable personnel file rights and where all corrective documentation will be placed.



SUMMARY

Facts- What did the employee do or not do?

Rule- What should the employee have done or not done?

Impact- How did the employees conduct adversely impact the workplace?

Suggestions/Directions- What should the employee do to improve his/her performance? What suggestions and directions can be provided to promote improvements?

Knowledge- Was the employee informed of his/her personnel file rights?

OUTCOMES

- Early warning
- Constructive opportunity to improvement
- Clear, consistent dialogue
- Hoesnt, objective Employee Assessment
- Credible Working Relationships

COMMON PERFORMANCE RECORDS:

- Conference Summaries and Memos
- Written Warnings
- Written Reprimands
- Formal Evaluations
- Disciplinary Notices
- Performance Success Plans/Performance Improvement Plans

RECORDING UNSATISFACTORY PERFORMANCE

Unless an employee commits a serious infraction which justifies dismissal, such as theft, battery, or fraud, ongoing documentation of performance deficiencies is crucial. Knowledge of poor performance needs to be supported by proof. The proof comes clearly described, legally sufficient documentation will be the employers primary source of evidence to support any submitted claims.

COMMON PERFORMANCE RECORDS

- Conference Summaries and Memos
- Written Warnings
- Written Reprimands
- Formal Evaluations
- Disciplinary Notices
- Performance Success Plans/Performance Improvement Plans



ELEMENTS TO CREATING LEGALLY SUFFICIENT DOCUMENTATION

Stating credible facts - Firsthand knowledge through direct observation. Allegations from another person in an oral or written complaint that has been investigated by the valuator and found to be reliable.

Clearly describing the facts - Accurately portray the problem and enable the employee to understand. Establish just cause thorough clear, specific, complete and understood facts.

****Vague subjective statements send mixed messages and require the employee to guess the problem. Employees should not have to decode the message.*

USING PERFORMANCE DESCRIPTORS

Descriptors from existing performance standards, job requirements and behavior norms help supplement facts and support performance expectations.

Examples:

- Evaluation Standards and descriptors
- Job Descriptions
- Policies and Procedures
- Department Manuals
- Employee Handbook
- contracts

THE FIVE 'FACTS QUESTIONS'

Who is involved?
What happened?
Where did it happen?
When did it happen?
How did it happen?

EXAMPLES OF CLEAR, CREDIBLE FACTS

“You were late numerous times”
- general

“You were late eight times in the month of June” - supporting

“You used offensive words to fellow employees” - general

“On June 8th, you called John B a jerk” - supporting

““You misspelled words in a parent letter” - general

“You incorrectly spelled assignments and conference in the June 13th parent letter” - supporting

DISTINGUISHING COMMANDS AND PERMISSIVE VERBS

When giving directions and expectations avoid using permissive language.

“You are required” - Command

“Please consider” - Permissive

“Return the report to me by” - Command

“It would be helpful” - Permissive

“Please do the following” - Command

“Would you mind” - Permissive

PROGRESSIVE INTERVENTION STEPS

1. Coaching
2. Conferencing
3. Written Warning/ Performance Plans
4. Written Reprimand



Write Up FORM

DATE:

EMPLOYEE NAME:

WRITE-UP #:

SUPERVISOR NAME:

DESCRIPTION OF INCIDENT

ACTION TO BE TAKEN

EMPLOYEE'S STATEMENT

EXPECTED IMPROVEMENT

EMPLOYEE SIGNATURE: _____

DATE: _____

SUPERVISOR SIGNATURE: _____

DATE: _____

Calendar

MONTH:

1ST			
2ND			
3RD			
4TH			
5TH			
6TH			
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19TH		27TH	
20TH		28TH	
21ST		29TH	
22ND		30TH	
23RD		31ST	

NOTES: