Performance
PLANNER

EXCEL ACADEMY
A Tri-12 Public Charter School

MADE TO BE
EXCELLENT

GOALS

WRITE YOUR INDIVIDUAL GOALS BELOW BASED ON THE SCHOOL GOALS AND YOUR DEPARTMENT'S GOALS:

1	SUSTAINABLE GROWTH	

2	RETENTION	

3	QUALITY PROGRAMS	

4	PROFESSIONAL DEVELOPMENT	

EXCEL ACADEMY
A TK-12 Public Charter School

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

- 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 infromated 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

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	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](#)
- [Classified Self-Assessment](#)

HR
PERFORMANCE
RESOURCES

LINKED

[Error & Achievement Form - ToRs](#)

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

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

[Error & Achievement AcknowledgmentForm](#)

[Shout Outs](#)

[Evaluation Tracking Sheet](#)

[Performance Success Plan](#)

[Performance Improvement Plan](#)

[Performance Improvement Process](#)

INCLUDED

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

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.

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: _____

Conference Summary

Date ▮▮▮▮▮▮▮   **Conf. Title** ▮▮▮▮▮▮▮▮▮▮▮▮

Summary

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October 2022

MON	TUE	WED	THU	FRI	SAT	SUN
26	27	28	29	30	01	02
03	04	05	06	07	08	09
10	11	12	13	14	15	16
17	18	19	20	21	22	23
24	25	26	27	28	29	30
31	01	02	03	04	05	06

NOTES

November 2022

MON	TUE	WED	THU	FRI	SAT	SUN
31	01	02	03	04	05	06
07	08	09	10	11	12	13
14	15	16	17	18	19	20
21	22	23	24	25	26	27
28	29	30	01	02	03	04

NOTES

December 2022

MON	TUE	WED	THU	FRI	SAT	SUN
28	29	30	01	02	03	04
05	06	07	08	09	10	11
12	13	14	15	16	17	18
19	20	21	22	23	24	25
26	27	28	29	30	31	01

NOTES

January 2023

MON	TUE	WED	THU	FRI	SAT	SUN
26	27	28	29	30	30	01
02	03	04	05	06	07	08
09	10	11	12	13	14	15
16	17	18	19	20	21	22
23	24	25	26	27	28	29
30	31	01	02	03	04	05

NOTES

February 2023

MON	TUE	WED	THU	FRI	SAT	SUN
30	31	01	02	03	04	05
06	07	08	09	10	11	12
13	14	15	16	17	18	19
20	21	22	23	24	25	26
27	28	01	02	03	04	05
31	01	02	03	04	05	06

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March 2023

MON	TUE	WED	THU	FRI	SAT	SUN
27	28	01	02	03	04	05
06	07	08	09	10	11	12
13	14	15	16	17	18	19
20	21	22	23	24	25	26
27	28	29	30	31	01	02

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April 2023

MON	TUE	WED	THU	FRI	SAT	SUN
26	27	28	29	30	01	02
03	04	05	06	07	08	09
10	11	12	13	14	15	16
17	18	19	20	21	22	23
24	25	26	27	28	29	30

NOTES

May 2023

MON	TUE	WED	THU	FRI	SAT	SUN
01	02	03	04	05	06	07
08	09	10	11	12	13	14
15	16	17	18	19	20	21
22	23	24	25	26	27	28
29	30	31	01	02	03	04

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June 2023

MON	TUE	WED	THU	FRI	SAT	SUN
29	30	31	01	02	03	04
05	06	07	08	09	10	11
12	13	14	15	16	17	18
19	20	21	22	23	24	25
26	27	28	29	30	01	02

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