



Performance Process

2023-2024

CONTENTS

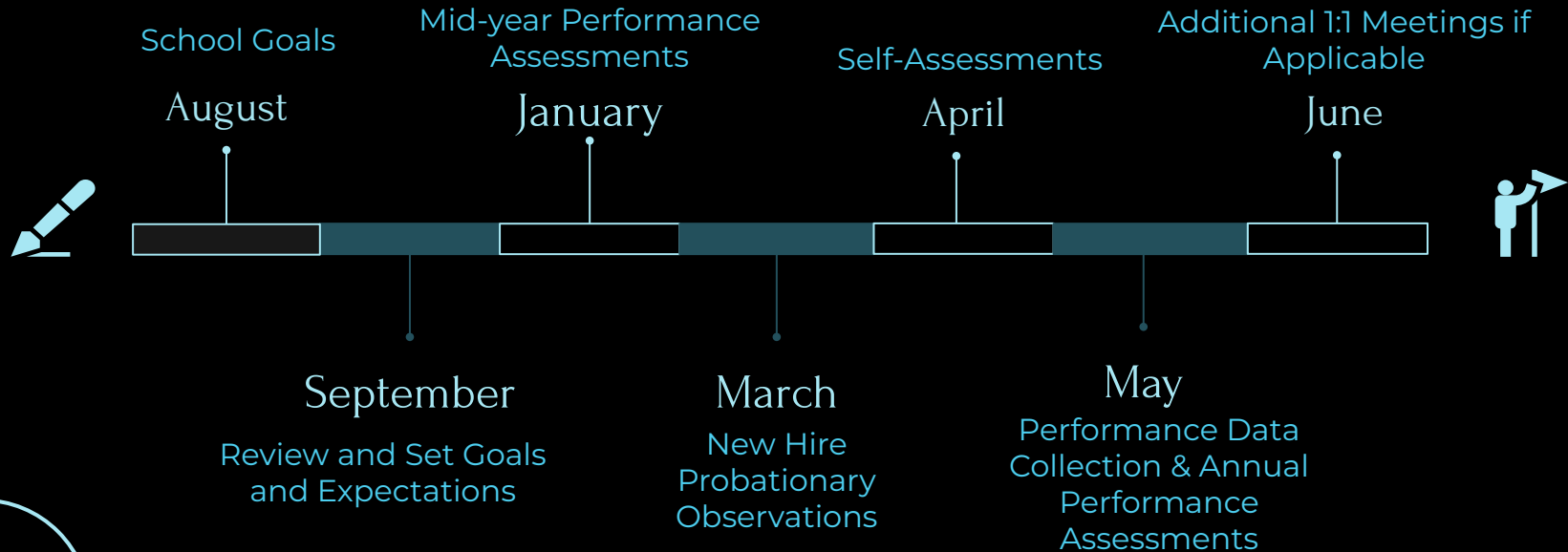
Annual Timeline	INSPIRE
Reviewer Org Chart	FRISK
5 C's of Documentation	HR Resources
Assessments	Supervisor Training

TIMELINE



8/12 months include touch points to:

- Gather data & document
- Communicate Expectations
- Implement Solutions
- Train
- Make informed decisions



Reviewer Org Chart

Support resources such as the reviewer org chart makes understanding performance responsibilities easier for supervisors.

Last Name	First Name	Email	Position	Peer Approver	Management Approver	Admin Approver	Peer Assessment	Self Assessment	Employee Assessment
Craven	Heather	hcraven@excelacademy.education	Virtual Path Teacher	Kristen Stawniczy	Christa Nick	April Saade	Lead Teacher Assessment	Virtual Self-Assessment	Virtual Assessment
Stubbs	Joanie	jstubbs@excelacademy.education	Virtual Path Teacher	Kristen Stawniczy	Christa Nick	April Saade	Lead Teacher Assessment	Virtual Self-Assessment	Virtual Assessment
Lima	Kelsey	klima@excelacademy.education	Virtual Path Teacher	Kristen Stawniczy	Christa Nick	April Saade	Lead Teacher Assessment	Virtual Self-Assessment	Virtual Assessment
Khaki	Kailey	kkhaki@excelacademy.education	Virtual Path Teacher	Kristen Stawniczy	Christa Nick	April Saade	Lead Teacher Assessment	Virtual Self-Assessment	Virtual Assessment
Rexin	Tamara	trexin@excelacademy.education	Virtual Path Teacher	Kristen Stawniczy	Christa Nick	April Saade	Lead Teacher Assessment	Virtual Self-Assessment	Virtual Assessment
Filipponio	Frank	ffilipponio@excelacademy.education	Virtual Path Teacher	Kristen Stawniczy	Christa Nick	April Saade	Lead Teacher Assessment	Virtual Self-Assessment	Virtual Assessment
Stawniczy	Kristen	kstawniczy@excelacademy.education	Virtual Path Teacher	Kristen Stawniczy	Christa Nick	April Saade	Lead Teacher Assessment	Virtual Self-Assessment	Virtual Assessment
Levine	Lori	llevine@excelacademy.education	Virtual Path Teacher	Kristen Stawniczy	Christa Nick	April Saade	Lead Teacher Assessment	Virtual Self-Assessment	Virtual Assessment

5 C's of Documentation

Clear

When documenting performance concerns and situations be clear in your notes, conference summary, counseling form or written reprimand. Using all available details, get as specific as possible using dates, times and major details.

Concise

Stick to the details and the facts; avoid using judgment or conclusions.

Correct

Make sure all your information is correct and corroborated through data, evidence or details provided by other employees, parents etc.

Complete

Make sure to close the loop. When addressing specific performance concerns, discuss and outline solution timelines; make sure follow up is scheduled and completed. Always lean into HR so support!

Communication

Keep dialog open, engage in follow up conversations, comprehension checks and progress updates. Make sure your expectations are not only always properly communicated but comprehensive.

Assessments



Mid-Year



Self



Peer



Employee

**** Mid-Year, Self and Employee Assessments are all the same! Using identical data points not only allows us to track performance apples-to-apples it helps us to understand how the employee views their work in accordance to expectations and personal goals.*

Sample Assessment Questions:

ToR fully supported students and parents by ensuring learning and progress took place, intervening when necessary and appropriate.

The ToR was readily available to students, parents, support staff and administrators to answer questions, collaborate ideas, provide support, and be an overall team player

Identified staff strengths and weaknesses; provided methods of support including training and access to materials to enhance performance.

Has a pulse on department needs and proactively implements policies and procedures to solve potential problems.

The Case Manager worked in collaboration and organization with internal and external service providers to extend appropriate services to all Special Education students ensuring FAPE offerings in the LRE.

Defined department direction by shaping and creating policies and procedures, clarifying deadlines, roles and responsibilities and accountability to maintain streamlined processes.

Created and facilitated partnerships within internal departments, community providers, CBO, other NCB schools, professional associations membership associations and authorizing districts

INSPIRE (level 1)

Initiate - Reach out to initiate contact - "Hi, Joe I would like to schedule a meeting to review a few things the team has noticed"

Notice - Objective observation of behavior - "I noticed that you have missed the last two budget deadlines"

Support - Support your observation through detail - "The FIB was due March 13th and you didn't send it until March 27"

Probe - Ask openminded questions - "Is there a roadblock or extra support we can help you? What has been getting in the way?"

Invite - Invite solutions together - "Based on your feedback how can we make sure the system is running faster?, should we schedule a meeting with the developer?"

Review - Recap conversations (in writing) and check for comprehension - "Based on our conversation today you've been experiencing system delays that have been interfering with you meeting budget deadlines. You are clear of expectations regarding deadline compliance and will schedule a follow up meeting with system developers to try and repair system bugs. Moving forward you will notify Admin if budgets may be late."

Enforce - Determine follow up actions - "We can follow up again on May 13th after speaking with the developers and again let's touch base after the next deadline is approaching"



FRISK (level 2)

Scope

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

FRISK - cont.

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?

FRISK - cont.

Outcomes

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

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

HR Performance Resource Suite

The purpose of this document is to clearly articulate expectations related to your performance in your job and provide support for you to meet these expectations. Your employment is “at will”. You and your supervisor will review the contents of this PIP for you to understand the corrective action(s) required on an immediate and sustained basis. The potential consequences for non-compliance may result in the termination of your employment. You have either received previous Verbal Counseling and/or Written Warning(s) pertaining to the violations checked below, or you violated provisions of the Employee Handbook and/or aspects of your job description as noted below which resulted in the generation of this PIP.

Violations of Employee Handbook Policies:

<input type="checkbox"/>	Harassment – page __	<input type="checkbox"/>	Workplace Violence – page __
<input type="checkbox"/>	Conflicts of Interest – page __	<input type="checkbox"/>	Drug-Free Workplace – page __
<input type="checkbox"/>	Unauthorized Overtime – page __	<input type="checkbox"/>	Social Media – page __
<input type="checkbox"/>	Meal/Rest Break– page __	<input type="checkbox"/>	Standards of Conduct – page __
<input type="checkbox"/>	Timekeeping – page __	<input type="checkbox"/>	Electronic Communication – page __
<input type="checkbox"/>	Paid Time Off – page __	<input type="checkbox"/>	Computer Usage & Privacy – page __
<input type="checkbox"/>	Punctuality & Attendance – page __	<input type="checkbox"/>	Prohibited Conduct – page __
<input type="checkbox"/>	Personal Appearance/Conduct–page __	<input type="checkbox"/>	Other: _____
<input type="checkbox"/>	Staff/Student Relations – page __	<input type="checkbox"/>	Other: _____

TASKS, SKILLS OR BEHAVIOR

The tasks, skills and/or behaviors below represent the area(s) in your performance that require immediate and sustained improvement.

TASK, SKILL OR BEHAVIOR Describe the specific task, skill or behavior that does not meet expectations
CURRENT PERFORMANCE Describe specific current performance. Give examples and use dates, numbers and/or other tangibles.
EXPECTED PERFORMANCE Describe the specific performance expectations for this task or skill

+

TRAINING/SUPPORT PROVIDED OR NEEDED	
Supervisor Suggestions:	Employee Suggestions:
Agreed-Upon Next Steps:	

ACKNOWLEDGMENT OF INITIAL CONVERSATION	
Employee Signature:	Date:
Supervisor Signature:	Date:
Human Resources Signature:	Date:

FOLLOW UP Please include specific examples of observations of employee's performance towards overall goal during first 30 days of this PIP (ex: 50% improvement of task, no tardiness, increased documentation of work completed, etc.)	
30 day Follow Up – Observed Performance	30 day Follow Up - Comments

Forward this completed document to Human Resources within 3 business days.

90 day Follow Up – Observed Performance	90 day Follow Up - Comments

Employee Signature: _____ Date: _____

Supervisor Signature: _____ Date: _____

Human Resources Signature: _____ Date: _____

OUTCOME

_____ Successfully completed

_____ Not successful

_____ Extended to: _____

Explanation and/or details of infraction (attach additional pages if needed):

There must be immediate and sustained improvement as follows:

I understand my employment remains at will. The above has been discussed with me by my supervisor. I understand the contents and acknowledge and understand the corrective action required. I also acknowledge and understand the potential consequences of non-compliance which may include further disciplinary action including termination. I understand my signature does not indicate agreement and that refusal to sign will not invalidate this disciplinary action.

Forward this completed document to Human Resources within 3 business days.

NOTICE OF: VERBAL COUNSELING X WRITTEN WARNING

Employee:	Date:
Job Title:	Supervisor:
Location:	Department:

This disciplinary action is being taken for the following reasons:

Violations of Employee Handbook Policies:

- | | |
|--|---|
| <input type="checkbox"/> Harassment – page __ | <input type="checkbox"/> Workplace Violence – page __ |
| <input type="checkbox"/> Conflicts of Interest – page __ | <input type="checkbox"/> Drug-Free Workplace – page __ |
| <input type="checkbox"/> Unauthorized Overtime – page __ | <input type="checkbox"/> Social Media – page __ |
| <input type="checkbox"/> Meal/Rest Break – page __ | <input type="checkbox"/> Standards of Conduct – page __ |
| <input type="checkbox"/> Timekeeping – page __ | <input type="checkbox"/> Electronic Communication – page __ |
| <input type="checkbox"/> Paid Time Off – page __ | <input type="checkbox"/> Computer Usage & Privacy – page __ |
| <input type="checkbox"/> Punctuality & Attendance – page __ | <input type="checkbox"/> Prohibited Conduct – page __ |
| <input type="checkbox"/> Personal Appearance/Conduct – page __ | <input type="checkbox"/> Other: _____ |
| <input type="checkbox"/> Staff/Student Relations – page __ | <input type="checkbox"/> Other: _____ |

Violations of Job Description Essential Functions/Duties/Responsibilities (describe/list below):

- | | |
|--------------------------------|--------------------------------|
| <input type="checkbox"/> _____ | <input type="checkbox"/> _____ |
| <input type="checkbox"/> _____ | <input type="checkbox"/> _____ |

Need Support?

- ★ 1:1 HR Support below
[Click Here](#)
- Annual Admin Summit Training
- Mid-Year and Annual Assessment Support