



# Compass Charter School

Proposal for Talent Equity Support

June 4, 2021

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Advancing equity. Every time.



## Revamp Performance Management System (15K)

Clarify most critical orgwide goals and how they trickle to each department. Determine how to incorporate core values and relationship orientation into the system that holds staff accountable for results.

### End Goal: We will work with leadership to clarify the following:

- **Orgwide Big Rocks:** What must be true for the organization to be successful?
- **Goal Mapping:** How does each team contribute to the Big Rocks?
- **Intangibles:** How do organizational core values impact performance?
- **Artifacts:** What data is needed to demonstrate progress to goals? What forms should staff use to reflect on progress?
- **Feedback:** What mechanisms should be in place to discuss progress? How often should discussions happen?

### Key Deliverables

- Strengths and needs report
- 2 manager trainings
- Complete system redesign including orgwide goals, guidance, forms, & feedback structures

### Workflow

# 1

#### Initial Audit

Host 3 focus groups (staff, direct mgrs, leaders) to collect perspective. Provide a report to highlight contributors and detractors to an equitable system.

# 2

#### Design Workshop

Tailor a half-day interactive workshop that helps your senior leaders identify the big rocks, intangibles and corresponding metrics that serve as the guiding vision for orgwide performance.

# 3

#### System Design

Develop performance management guidance that speaks to the issues uncovered in the audit and supports the priorities clarified in the design training.

# 4

#### Soft Launch

Leverage a representative sample of staff to try out the newly designed system and provide feedback. Revise system to address feedback.

# 5

#### Manager Training

Tailor an interactive workshop that helps your managers connect their priorities to the big rocks and set meaningful goals for their staff members.

## Job Description Revamp (10K)

Work with people managers to clarify the key buckets of responsibilities, required competencies & corresponding goals for each unique role in the organization.

**End Goal:** We will work with managers to outline the following for each role.

- **Purpose:** For whom is my work completed? Who does my success benefit?
- **Success Bar:** What should be true if it's done well? What goals should we hit? How does that map to our organizational goals?
- **Key Buckets:** What are the big buckets of responsibility? Where do I lead vs support? What does it mean to manage direct reports or oversee a function?
- **Implementation Guides:** How might this look on a day to day?
- **Core Requirements:** What knowledge, skills and credentials are required for success?

**Key Deliverables**

- 2 audit reports covering 30 spot check assessments
- 2 manager trainings
- 2 blocks of coaching support
- Orgwide bank of updated concise job descriptions
- Organizational JD template

## Workflow

1

### Initial Audit

Spot check 15 job descriptions, providing direct feedback to assess the current state. Provide a report of strengths and growth areas to inform a manager training.

2

### Manager Training

Tailor a interactive workshop that helps your people leaders outline the bar for success and clarifies how they will be held accountable in their roles.

3

### Coaching Calls

Provide two 90-minute blocks of office hour support leading up to the submission deadline, serving as a thought partner for individual job description questions.

4

### Leadership Training

Guide leaders to analyze the job descriptions they've received and calibrate for consistency. Develop feedback and revisions to provide their management team.

5

### Growth Report

Spot check 15 job descriptions to assess progress. Provide an org specific template that can be used for future job descriptions to maintain clarity and transparency.

**Revise Infraction Guidance (5K)**  
Work with HR team and program leaders to develop a system for managing underperformance. Clarify when to coach people through vs coach people out.

## End Goal: We will work with the cabinet to clarify the following:

- **Evaluation:** How do managers differentiate between staff who need coaching and those who need consequences?
- **Coaching:** What is our philosophy? To what extent are managers and coaching staff expected to develop people?
- **Consequences:** What types of actions warrant disciplinary action? Which disciplinary actions should be taken?
- **Deal Breakers:** When does a manager need to pursue separation?
- **Documentation:** What needs to be in place at each phase?

## Key Deliverables

- Clear guidance for coaching and consequences
- 1 manager training to explain shifts in policy

## Workflow

1

### Initial Audit

Hold a mgr focus group to analyze the current system and highlight strengths and needs in regards to coaching & consequences.

2

### Design Workshop

Tailor a interactive workshop that helps your people leaders clarify expectations and desired paths of action.

3

### Manager Training

Tailor an interactive workshop that helps your managers align on the updated policy and apply to some common manager scenarios

## Project Timeline

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**Audit:** Assess the Performance Management, Job Descriptions and Infraction Guidance. Develop internal findings report.

**Design:** Facilitate PM & infraction leadership design session, develop PM guidance, help managers design job descriptions through training.

**Assess & Revise:** Facilitate soft launch of the new PM system in focus group with staff. Support managers with JD feedback.

**Training & Reporting:** Provide managers guidance on the performance management system & new infraction guidance, evaluate updated JDs & summarize progress.