Performance and Professional Growth Guide

Non-Instructional Leadership

For use by
Supervisors, Managers, Directors,
Assistant Superintendents, and Associate Superintendents

BREVARD PUBLIC SCHOOLS

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Introduction

When performance management activities are integrated and coordinated in an on-going cycle, organizations have the best chance to succeed. Some important elements of performance management include those shown on the visual below:

The Non-Instructional Performance and Professional Growth System focuses on two of the "gears" in the performance management "machine":
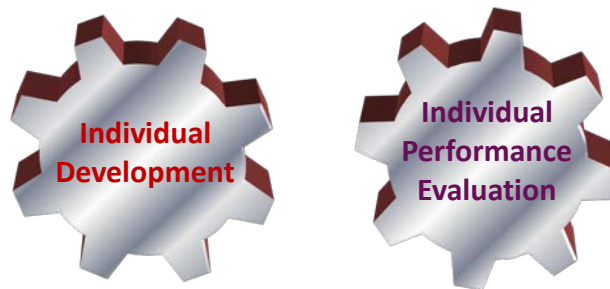
The purpose of the Non-Instructional Performance and Professional Growth System is to develop, improve, and enhance skills, as well as assess the performance of the district's leadership staff. And best-in-class systems ensure that the following attributes are included in an effective system:

- Provides for collaboration between the supervisor and the employee.
- Establishes individual goals and objectives.
- Focuses on employee Professional Growth with emphasis on the shared responsibility for its accomplishment.
- Provides both qualitative and quantitative feedback.
- Is a continuous, multi-faceted process, not a once-a-year event.
- Is applied consistently.
- Includes training on how to optimize the process.

This guide will present each of these key attributes individually with many examples, tools, and process instructions provided to make the system as understandable and easy to use as possible.

This system is intended to be used by district staff who are in leadership positions outside of the instructional world. These primarily are the business functions responsible for running the district, such as child care services, finance, facilities, human resources, information technology, food and nutrition, transportation, and security. These individuals supervise others and write their performance reviews, and usually have budgetary responsibilities.

The balance of this guidebook will provide detailed information on all of the system's elements and how best to use them together to ensure achievement of the program's objectives.

Key Process Elements

The Non-Instructional Leadership Performance and Professional Growth System includes the following key elements, which will be discussed in great detail:
- Individual Objectives (the "What" of an individual's performance)
- Job Dimensions (the "How" of an individual's performance)
- Individual Professional Growth Plan
- The Performance Management Cycle
- Systems Support: Training and Tools
- Forms and Processes

How Does All This Happen?

The Non-Instructional Performance and Professional Growth System is intended to be aligned to the district's strategic plan. The following illustrates the cycle to be followed at Brevard Public Schools:
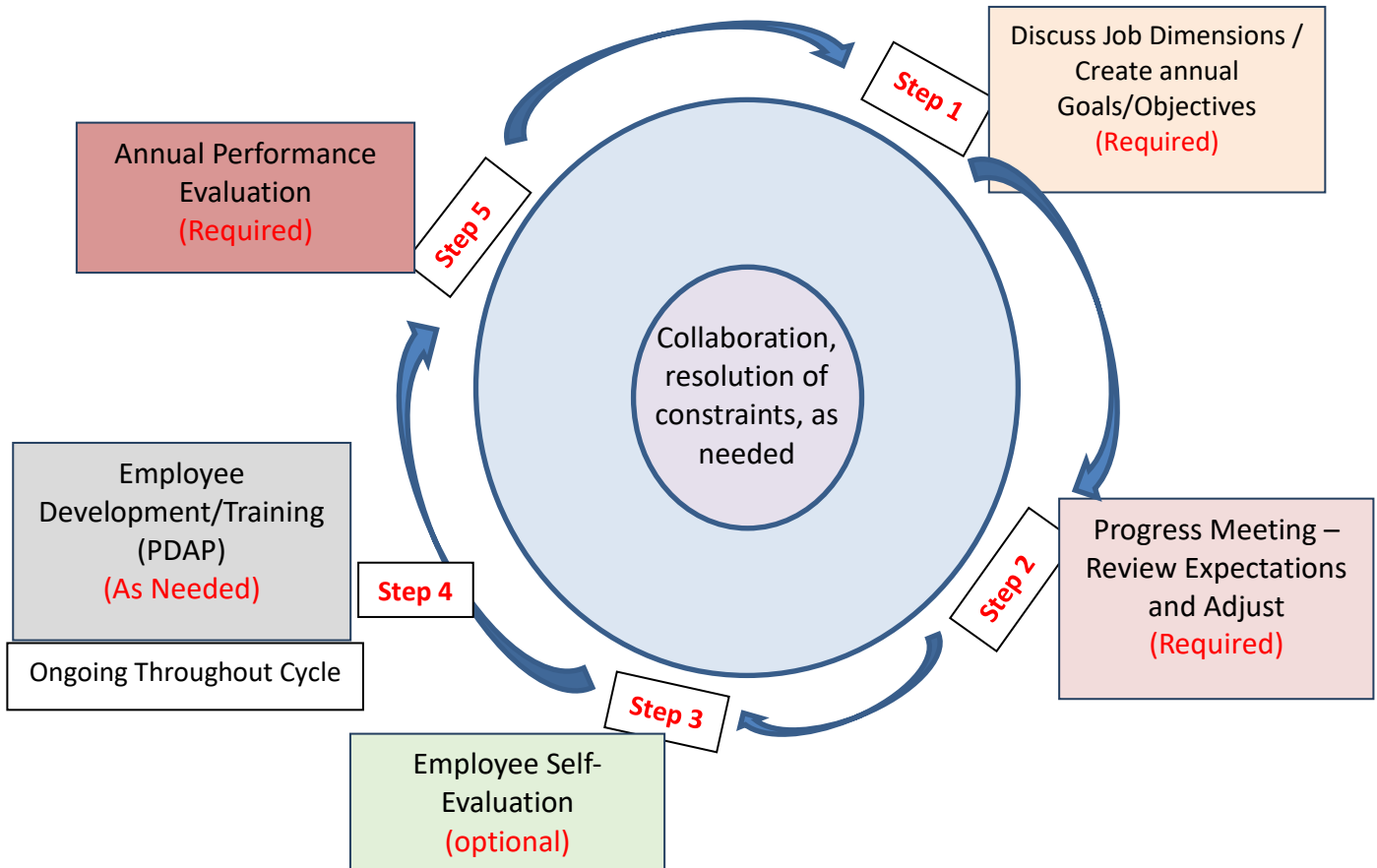
A total of three meetings would be held each year: Step 1 (September timeframe) includes establishing goals and objectives for the upcoming year; Step 2 (January timeframe) is a mid-year progress meeting to review expectations, make any needed adjustments, and discuss ongoing training and development activities; and Step 5 (June timeframe) is delivery of the final performance evaluation. Steps 1 and 5 could be combined into one meeting—to close out the prior evaluation period and to begin the new one.

Job Dimensions: The "How" of Individual Performance

The second part of Step I states that for the employee to succeed at reaching the established objectives, he or she must understand the behaviors and skills or Job Dimensions that BPS believes are important to success. An important part of the objective-setting meetings is to discuss these important skills and behaviors in the context of how they will help the employee achieve his or her objectives.

The Job Dimensions that have been identified for Non-Instructional Leadership positions are as follows:

- **Leadership**
- **Management Skills**
- **Communications**
- **Judgment**
- **Customer Service**
- **Teamwork**

Once it is time to complete the annual performance evaluation (covered as Step 3 later in this guide), the following rubrics are used to assess the level of performance in each of the Job Dimensions:

Highly Effective	Effective	Needs Improvement/Developing*	Unsatisfactory
Consistently exceeds expectations in the key elements and behavioral evidence of this job dimension.	Demonstrates strong performance in most key elements and behavioral evidence of this job dimension.	Performs to minimum expectations in several of the key elements and behavioral evidence of this job dimension. Is Developing in the first year in position.	Fails to meet the minimum performance requirements in most key elements and behavioral evidence of this job dimension.

*For the first year in a job assignment, performance at this level should be designated as Developing.

Each of the Job Dimensions is assigned a weight. When the annual performance evaluation is completed, the supervisor assigns an overall performance rating to each Job Dimension, which in turn defines how much of the weighted amount the employee's performance has achieved. All of the achieved weights added together result in an overall performance rating ranging from Highly Effective to Unsatisfactory. The assigned weights for each Job Dimension are as follows:

Scoring Rubric
Non-Instructional Support Personnel

	WEIGHT	HE	E	D/NI	U
Leadership	20%	20	15	10	5
Management Skills	20%	20	15	10	5
Communications	15%	15	12	8	4
Judgment	15%	15	12	8	4
Customer Service	15%	15	12	8	4
Teamwork	15%	15	12	8	4

Overall

Highly Effective	>89
Effective	65-88.9
Developing/Needs Improvement	39-64.9
Unsatisfactory	<39

Each of the following sections of this guide addresses one of the above six Job Dimensions in great detail in terms of definition, key elements of the dimension, observable evidence of the dimension in action, measuring performance, skill enhancers, personal growth activities, and specific training. These sections are valuable to both the supervisor and the employee in understanding the definitions of each of the Job Dimensions and by providing suggestions for enhancing skills and growing professionally in each one.

Leadership

Work effectively using appropriate interpersonal styles and methods to inspire and guide individuals (direct reports, peers, and superiors) toward goal achievement. Modify behaviors to accommodate tasks, situations, and individuals. Create and achieve a desired future vision by influencing organizational values, individual and group goals, and systems.	Leaders are able to create unity and teamwork, foster a stimulating environment, and ensure people believe that their work adds value and benefits the organization. He or she assembles the most effective team of employees, communicates so that everyone understands the organization's strategy and objectives, and provides the needed systems and recognition to support the work to be done.

Key Elements of Leadership

- Incorporates, supports, and upholds the core organizational vision.
- Educated risk taker with positive results.
- Recognizes individual and team accomplishments in an unbiased manner.
- A role model who demonstrates integrity, fairness, ethical behavior, and decisiveness while maintaining appropriate confidentiality.
- Motivates, inspires, mentors, and empowers others to excel in their job performance.

Behavioral Evidence of Leadership

- **Desires to lead** and is enthusiastic about it.
- **Initiates discussions with internal partners**, stating specific meeting purpose, describing the encounter's importance, and establishing rapport.
- **Clarifies situations with internal partners** by describing the issues in objective and behavioral terms, asking open-ended questions, and avoiding taking sides.
- **Establishes shared goals,** identifying and gaining agreement of common goals.
- **Collaboratively develops ideas and solutions,** seeking and building upon others' inputs.
- **Recognizes others' contributions and concerns,** praising efforts and participation, while listening carefully.
- **Agrees on needed action** that will be mutually beneficial and establishes a specific and detailed action plan.
- **Summarizes the results of discussions,** assigning responsibility, establishing resources, and scheduling milestone completion dates.
- **Encourages others to work toward organizational goals,** clearly communicating their value.
- **Translates organizational vision** into specific individual and team behavioral and results expectations.
- **Manages and modifies work activities** to facilitate goal accomplishment.
- **Proposes new systems** as well as aligns existing systems to achieve organizational vision (such as selection, training, and compensation).
- **Recognizes team and individual achievements** toward organizational goal achievement. Enhances others' performance and builds excellence.
- **Models through his or her own work** support of strategic objectives.

Measuring Leadership Performance

Consider the key elements and behavioral evidence of **Leadership** when evaluating an individual's performance in this job dimension. The following rubrics will help in determining an individual's most consistent performance:

Highly Effective	Effective	Needs Improvement/Developing	Unsatisfactory
Consistently exceeds expectations in the key elements and behavioral evidence of this job dimension.	Demonstrates strong performance in most key elements and behavioral evidence of this job dimension.	Performs to minimum expectations in several of the key elements and behavioral evidence of this job dimension. Is Developing in the first year in position.	Fails to meet the minimum performance requirements in most key elements and behavioral evidence of this job dimension.

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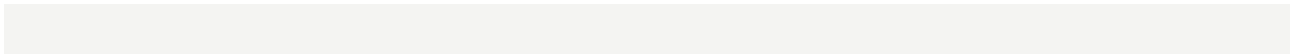
Leadership Skill Enhancers

- **Anticipate** the feelings of others before discussions of issues.
- **Admit mistakes.**
- **Share credit** for successes.
- **Be open** to new ideas.
- **Be prepared** prior to discussions and meetings.
- **Try to reach win-win outcomes,** by being willing to compromise.
- **Involve others** who have a vested interest in an issue's outcome and who can bring fresh perspectives to problem solving.
- **Ask for help** when trying to gain others' commitment.
- **Consider non-conventional approaches** when resolving problems and issues.
- **Review all projects** to ensure they continue to support the organization's vision.
- **Reduce to writing** where you would like your team to be in a year's time in terms of behaviors involving output, customer satisfaction, teamwork—and how you plan to get there.

Professional Growth Activities

- Observe a strong leader; write down the values this person exemplifies and how he or she puts them into observable action. If possible, talk with the individual about what you have observed.
- Ask an associate to observe your influencing behaviors during a meeting or discussion and provide specific, behavioral suggestions for improvement.
- Identify a successful long-term team or department project and ask the people responsible about their approaches to encouraging and motivating others, reinforcing goal attainment, securing/improving needed systems and processes to ensure success.
- Find ways to form mutually beneficial alliances with others; focus especially on individuals whose style and/or positions differ from yours.
- Talk with your staff about their observations of you: what do you do to support the organization's vision and which actions are inconsistent?
- Join cross-functional, interdepartmental teams.
- Take on a project that requires modification to a work process to better support organizational values.

Specific Training Activities

- Complete the Brevard Public Schools Non-instructional Core Leadership Training offerings:
    - New Manager Assimilation/Ongoing Manager Assessment
    - Interaction Management
    - Situational Leadership
    - True Colors
- Participate in a workshop designed to build and enhance strategic leadership skills.

Management Skills

Coordinate the efforts of people to accomplish goals and objectives using available resources efficiently and effectively. Includes planning, organizing, staffing, directing, and controlling an organization or initiative to accomplish goals. Also includes the deployment of human, financial, and technological resources.	Productive and effective management skills are not innate qualities; management skills can be cultivated, developed and learned. These are the activities which are critical to ensure that an organization defines and achieves its goals. Leaders use this toolbox of skills and abilities to carry out the work of the organization efficiently and effectively. Management skills often include forecasting and planning, organizing, coordinating, controlling, budgeting, innovating, resolving conflict, evaluating, disciplining, rewarding, and improving productivity. They also include managing time, costs, change, and ethics.

Key Elements of Management Skills

- Provides clear, concise direction to subordinates and follows up to ensure understanding.
- Uses resources effectively to prioritize and complete tasks on time and within budget.
- Seeks out and implements best practices.
- Initiates and takes action to resolve problems in a timely manner.
- Is aware of and complies with all applicable laws, statutes, and policies.
- Completes annual performance evaluations and developments discussions for all direct reports on time.

Behavioral Evidence of Management Skills

- **Breaks down the broader mission statements** into smaller, actionable chunks.

- **Organizes and prioritizes** work to be accomplished, assigning resources and establishing priorities for completion.

- **Forecasts and budgets needed resources** and manages day-to-day expenditures.

- **Delegates by matching people with tasks,** then follows up to ensure removal of any constraints and goal accomplishment.

- **Does not hesitate to resolve conflict** between two or more people and does so in a constructive fashion for all parties involved.

- **Completes all aspects of performance management**—establishing objectives, monitoring progress, removing constraints, providing informal feedback, supporting individual development, and completing annual performance reviews--in a timely fashion.

- **Publically acknowledges and rewards** employees for high-quality work.

- **Handles discipline issues** to ensure resolution and to avoid resentment among other team members.

- **Continually assesses outcomes and deliverables** of the organization for continuous improvement. Is knowledgeable of best practices and initiatives their implementation.

- **Demonstrates effective meeting management** to achieve meeting objectives in a minimum amount of time, leaving participates with a belief that a sensible, productive process has been followed.

Measuring Management Skills Performance

Consider the key elements and behavioral evidence of **Management Skills** when evaluating an individual's performance in this job dimension. The following rubrics will help in determining an individual's most consistent performance:

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Management Skills Enhancers

- **Schedule follow-up meetings at the completion of projects** to determine whether acceptable quality standards and time commitments were met.
- **Keep a "To Do" list.**
- **Use calendars, planners, tickler files** to ensure that nothing falls in the cracks.
- **Keep work in progress organized by priorities,** rather than by date or alphabetically.
- **Use electronic planning systems** for large projects with complex scheduling, milestones, and human participation.
- **Organize the use of communications tools,** like e-mail and phones, by using them early in the day, late in the day, or in batches.
- **Schedule uninterruptible time** to conduct meetings with staff to establish objectives, provide feedback, and complete the formal, year-end performance evaluation.
- **Read the personnel file of all staff** to learn everything you can about their experiences, education, skills, and abilities.
- **Identify an individual in your organization** whose management skills you admire and schedule a meeting with him or her to learn more.
- **Discipline problems rarely resolve themselves**. Be aware of issues that are festering and deal with them quickly.

Professional Growth Activities

- Explore management skills Websites like www.mindtools.com and www.profilesinernational.com for readings, courses, and videos on enhancing management skills.
- Observe others who are effective in using management skills and discuss their methods with them.
- Solicit feedback from peers, direct reports, and key constituents regarding a project, departmental program, or process that is under-performing. Propose several improvements.
- Ask an associate attending a meeting you facilitate to give specific, constructive feedback about how you can improve your meeting-management skills.
- Offer to manage project budgets to develop financial and budgeting competencies.
- Review your department budget and make recommendations for cutting costs and financial strategies that can maximize quality and efficiency.
- Talk with your staff about their observations of your specific management skills and their suggestions for your improvement.
- Start a list of issues in the workplace that are sabotaging your productivity and/or efficiency, and develop a specific plan to eliminate them.

Specific Training Activities

- Complete the Brevard Public Schools Non-instructional Core Leadership Training offerings:
    - New Manager Assimilation/Ongoing Manager Assessment
    - Interaction Management
    - Situational Leadership
    - True Colors
- Identify and attend a management skills development course to enhance your skills toolbox.
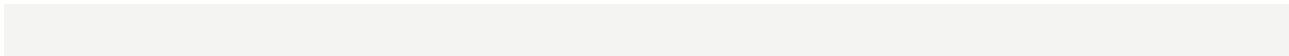
Communications

Understanding all modes of communications, including written, verbal, non-verbal, and listening skills. Effective use in individual and group situations, and the ability to adjust the message to meet audience needs.	The very best leaders exhibit the ability to present themselves and their ideas by successfully transmitting to others. They do this through what they write, say or don't say, and how well they listen. Effective communication helps one develop credibility and trust, express and inspire enthusiasm, solve problems, manage conflict, implement change, and develop others. It's said that everything in life has at its core effective communication—or the lack of it. This is most certainly true of great leaders.

Key Elements of Communications Skills

- Demonstrates effective verbal, non-verbal, written, and listening skills and uses these to resolve issues objectively and effectively.
- Gathers and disseminates information in a timely manner to the appropriate audience using the most effective media.
- Accepts and provides constructive feedback and responds positively.
- Presents ideas in a clear, concise, organized, and persuasive manner.

Behavioral Evidence of Communications Skills

- **Understands the audience** and customizes communications to meet their needs.

- **Watches attentively** for the reactions of others in discussions.

- **Maintains good eye contact** throughout the presentation or discussion.
- **Varies speed, volume, tone, and pitch** to keep the listener's attention.
- **Breaks down explanations of complex processes**, rules, or situations into manageable bites of information.
- **Uses appropriate non-verbal communications** such as gestures, facial expressions, and mannerisms) to make the point.
- **If emotions or tensions rise during a conversation,** effectively defuses the situation by remaining calm and sticking to the facts.
- **Uses visual materials** effectively.
- **Provides opportunities** for audience questions, listens carefully, responds, and checks for understanding.
- **Listens intently when others speak** to fully understand the points being made.
- **Asks appropriate questions** in order to understand fully what is being said.
- **Does not interrupt others.**
- **Demonstrates appropriate use of written communications** that are free of spelling, grammar, punctuation, and usage errors.
- **Ensures that there are few distractions** (extraneous noises, bright lights, interruptions) for the audience when making presentations.

Measuring Communications Performance

Consider the key elements and behavioral evidence of **Communications** when evaluating an individual's performance in this job dimension. The following rubrics will help in determining an individual's most consistent performance:

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Communications Enhancers

- Before making a presentation, identify the listeners' needs and list questions and potential objections that could arise.

- Before a formal presentation, make a general outline with a planned opening and closing that is natural for you. Practice!
- When you do not know the answer to a question or understand what the speaker is saying, ask for clarification.
- Questions can be open-ended, clarifying, closed and rhetorical. Practice using all types.
- Gestures can dramatize a point and make a presentation more interesting. Practice using gestures in front of a mirror to find the ones that work for you.
- Ask someone to video a presentation you give. Watch the video to identify areas of strength and areas that need work.
- If you're in a discussion and emotions begin to rise, pause for a few seconds to collect yourself, then move to presenting the facts.
- Improve your vocabulary. Learn at least one new word every day and make a point of using it in conversation.
- Analogies can add interest as well as meaning to your message.
- Identify messages and the media used that really impressed you. This will help you choose the appropriate way to deliver your message.

Professional Growth Activities
- Identify a specific behavior you'd like to improve. Share this with a coworker who can observe this behavior, and ask for specific feedback on how to improve.
- If you are challenged with written communications (e.g., spelling, grammar, and/or punctuation), identify a coworker who is strong in this skill and ask if he or she will mentor you for an hour each week.
- Practice a presentation in front of a friend or coworker and ask for direct, honest feedback.

Specific Training Activities
- Attend a communications workshop; join Toastmasters International.
- Look for opportunities to serve on committees and interdepartmental projects.
- Purchase a style guide (e.g., *The Chicago Manual of Style*) to teach yourself the fine points of spelling, grammar, and usage.
- Complete the Brevard Public Schools Non-instructional Core Leadership Training offerings:
    - New Manager Assimilation/Ongoing Manager Assessment
    - Interaction Management
    - Situational Leadership
    - True Colors

Judgment

The act or process of forming an opinion or making a decision after careful thought. Involves data gathering; consideration of alternatives; the use of logical assumptions; and cognizance of the potential outcomes of the opinion or decision given organizational values, resulting in decisions that are objective and wise.	Leaders make decisions and recommendations for action every day. Good judgment ensures that a chosen course of action has a high probability of success with minimal collateral damage. According to Noel M. Tichy and Warren G. Bennis (from their book, *Judgment)* "A leader's most important role in any organization is making good judgments—well-informed, wise decisions that produce the desired outcomes. When a leader shows consistently good judgment, little else matters. When he or she shows poor judgment, nothing else matters."

Key Elements of Judgment
- Researches issues, makes a judgment call, and executes the decision in the required timeframe.
- Effectively makes judgment calls during a crisis while maintaining self-control.
- Prepares technically to be equipped to demonstrate good judgment.
- Involves others and varying perspectives as appropriate in making judgment calls.
- Able to assemble the proper team to fit the organization's need.

Behavioral Evidence of Judgment
- Senses and frames issues.
- Assembles the proper team for decision making and action.

- Decisive; willing to take informed risks and executes to resolve issues.
- Adjusts judgment calls as conditions change if needed.
- Has a track record of making good judgment calls over time, especially in crisis situations.
- Takes ownership and responsibility for all decisions; never passes the buck when judgments aren't so good, and always shares credit when judgments are stellar.
- Understands the organization's culture and factors that understanding into decisions.
- Willingly and often solicits the ideas of others.

Measuring Judgment Performance

Consider the key elements and behavioral evidence of **Judgment** when evaluating an individual's performance in this job dimension. The following rubrics will help in determining an individual's most consistent performance:

Highly Effective	Effective	Needs Improvement/Developing	Unsatisfactory
Consistently exceeds expectations in the key elements and behavioral evidence of this job dimension.	Demonstrates strong performance in most key elements and behavioral evidence of this job dimension.	Performs to minimum expectations in several of the key elements and behavioral evidence of this job dimension. Is Developing in the first year in position.	Fails to meet the minimum performance requirements in most key elements and behavioral evidence of this job dimension.

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Judgment Skill Enhancers

- **Keep a communications and correspondence list** of people involved in or affected by a decision. Review the list periodically to make sure that you have "covered all the bases."
- **Whenever possible,** make difficult decisions when energy level and mental sharpness are high.
- **Debrief all decisions,** both good and not so good, to understand what went right and what went wrong.
- **Review several of your decisions with your supervisor or a respected associate,** and ask them what they thought of the process you followed and its outcome.
- **Some of the most important judgments are about people,** particularly about the individuals you choose to have on your team. Review your hiring decisions over the past and determine what made your good hiring decisions good and what likely led to not-so-good hiring judgments.

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- **After a crisis you had to manage is over,** meet with your supervisor or a teammate involved in resolving the crisis, and ask them for feedback about how you performed.
- **Think of judgment as a process, not a moment in time.** Think of decisions you've made that didn't go so well and record the process you followed (or didn't follow) in coming to those decisions.

Professional Growth Activities

- Read *Judgment* by Noel M. Tichy and Warren G. Bennis.
- Identify effective decision makers in your organization and bounce ideas off of them prior to finalizing a decision.
- Ask others for examples of poor judgment on your part, and discuss ways to prevent recurrences.
- Ask others to explain their decision-making processes and judgment calls on a particularly complex or high-impact decision.
- Seek out low-risk decision-making situations (e.g., member of a project team) that will involve you with decision-making experts.
- Identify volunteer community organizations where you can serve in a decision-making capacity.
- Ask your supervisor for an assignment where you can serve in a decision-making capacity, such as selecting new equipment, staffing changes, or planning a department celebration. Discuss your decision-making process and rationale prior to implementation to receive feedback for improvement.

Specific Training Activities

- Complete the Brevard Public Schools Non-instructional Core Leadership Training offerings:
  - New Manager Assimilation/Ongoing Manager Assessment
  - Interaction Management
  - Situational Leadership
  - True Colors

Customer Service

Proactively develop customer relationships by making efforts to listen to and understand both internal and external customers. Anticipate and provide solutions to their needs. Give high priority to customer satisfaction.	Individuals, departments, and operating units within our organization deal with each other as internal customers and suppliers. An organization is only as competent, knowledgeable, responsive, and reliable as the people they interact with most frequently. Members of successful organizations see their internal and external customers as an investment and recognize customer service as a powerful tool for maintaining and increasing that investment.

Key Elements of Customer Service

- Responds to customers' needs expeditiously.
- Demonstrates empathy, patience, professionalism, appropriate sense of urgency, and a positive demeanor.
- Asks questions to clarify issues or gather additional information to ensure proper course of action.
- Provides remedy to and closure of an issue to the customer's understanding and/or satisfaction.

Behavioral Evidence of Customer Service

- **Acknowledges customers** and gives them complete attention
- **Asks questions and analyzes information** to determine needs, problems, and requests.
- **Summarizes to check for understanding.**
- **Acts promptly**; agrees on a clear course of action.
- **Follows up** with customers after handling their problems to ensure satisfaction.
- **Thanks** the customer.

Measuring Customer Service Performance

Consider the key elements and behavioral evidence of **Customer Service** when evaluating an individual's performance in this job dimension. The following rubrics will help in determining an individual's most consistent performance:

Highly Effective	Effective	Needs Improvement/Developing	Unsatisfactory
Consistently exceeds expectations in the key elements and behavioral evidence of this job dimension.	Demonstrates strong performance in most key elements and behavioral evidence of this job dimension.	Performs to minimum expectations in several of the key elements and behavioral evidence of this job dimension. Is Developing in the first year in position.	Fails to meet the minimum performance requirements in most key elements and behavioral evidence of this job dimension.

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Customer Service Skill Enhancers

- Identify your customer base and schedule time with them to understand their needs and how you can fulfill them.
- Call a customer to ask about requirements, processes, or needs you might not be meeting.
- Correspond with customers, thanking them for bringing issues to your attention.
- Take advantage of opportunities to exceed customer expectations.
- Note how you are treated in situations when you are the recipient of customer service. Pay particular attention to behavior that impresses you. Use these situations as examples for improving your own customer service.
- Work at developing rational arguments for your ideas rather than relying on emotional appeals.
- When providing service in tense situations when your customer may be upset, practice mentally stepping back and breathing deeply.
- Ask an associate to observe you in performing customer service activities and ask for frank feedback on how you did.

Professional Growth Activities

- Request customer feedback on the quality of your service.
- Ask customers what it would take to satisfy them in a particularly difficult situation.
- Invite customers to your work area. Ask for suggestions on ways to improve service.
- Ask your manager to clarify how you can "bend" policy and how far you can go in terms of cost, time, and materials to meet customer needs.
- Ask your manager or coworker to observe your customer interactions and provide specific feedback.
- Observe people who provide excellent service with both routine and difficult service situations and discuss their approaches with them.
- Visit customers' work sites and learn what they do.

Specific Training Activities

- Complete the Brevard Public Schools Non-instructional Core Leadership Training offerings:
    - New Manager Assimilation/Ongoing Manager Assessment
    - Interaction Management
    - Situational Leadership
    - True Colors
- Participate in a workshop designed to build and enhance customer service skills.
- Seek opportunities or projects in which a high level of customer service is required.

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Teamwork

Working effectively with team and work groups or those outside formal lines of authority to accomplish organizational goals; taking actions that respect the needs and contributions of others; contributing to and accepting consensus; subordinating own objectives to that of the team.	All of us are immersed in a challenging set of relationships—with managers, peers, direct reports, customers, suppliers, and project teams, to name a few—that require considerable skill to handle well. Because many work activities require the input and cooperation of other people, teamwork will facilitate the optimal use of resources, as well as ultimately success and ownership. "*Alone we can do so little.* *Together we can do so much.*" Helen Keller

Key Elements of Teamwork

- Shares ideas and processes within the workgroup to improve performance, productivity, and effectiveness.
- Works well with others, including own team, other teams, and administration.
- Gains trust from coworkers, customers, and subordinates.
- Aware of and proactively involves appropriate stakeholders in decision-making processes.
- Seeks out opportunities to provide help to others when needed.

Behavioral Evidence of Teamwork

- **Cooperates** rather than competes with team members.
- **Respectful of others.**
- **Trustworthy** in managing information under consideration by the team.
- **Offers suggestions, options, and information** to team members.
- **Listens to and considers** the ideas of team members.
- **Supports group decisions** even if not in total agreement.
- **Helps team members** improve skills, knowledge, and attitudes.
- **Allows others to take credit** for good ideas.
- **Communicate changes or problems** to other team members.
- **Demonstrates tact** in dealing with and/or reacting to team problems.
- **Provides alternatives** if the team has difficulty reaching consensus.
- **Praises others' efforts,** ideas, and participation.
- **Takes individual ownership and accountability** for contributions necessary for the success of the entire team.

Measuring Teamwork Performance

Consider the key elements and behavioral evidence of **Teamwork** when evaluating an individual's performance in this job dimension. The following rubrics will help in determining an individual's most consistent performance:

Highly Effective	Effective	Needs Improvement/Developing	Unsatisfactory
Consistently exceeds expectations in the key elements and behavioral evidence of this job dimension.	Demonstrates strong performance in most key elements and behavioral evidence of this job dimension.	Performs to minimum expectations in several of the key elements and behavioral evidence of this job dimension. Is Developing in the first year in position.	Fails to meet the minimum performance requirements in most key elements and behavioral evidence of this job dimension.

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Teamwork Skill Enhancers

- Send thank-you notes or e-mails to others who help you and copy appropriate management.
- Offer to help someone at least once a week.
- Invite a quiet associate, within or outside of your department, to coffee or lunch.
- Take responsibility for a task that no one really likes to do.
- Identify a person you least like to work with; find an attribute or behavior of that person and sincerely compliment him or her on it.

Professional Growth Activities

- Identify an associate who is different from you in style and approach. Discuss with him or her how your strengths can complement each other.
- Ask your associates to tell you about themselves—their goals and aspirations.
- Watch a person who is most similar to you in style and approach. Observe his or her cooperative behaviors as clues to how you may be perceived.
- Observe people who collaborate with others effectively. Compare their behaviors with your own. Discuss their approaches with them and request feedback.
- Make a list of people with whom you cooperate and those with whom you have difficulty. Analyze the characteristics of the people in both categories and identify your sources of mis-cooperation. Discuss with your manager or other people ways in which you could collaborate better.
- In a non-critical situation, permit another person with whom you've had difficulties, with whom you have not worked before, or who is not particularly assertive to "win."
- Play team sports; if possible, join a company or department team or league.

Specific Training Activities

- Complete the Brevard Public Schools Non-instructional Core Leadership Training offerings:
  - New Manager Assimilation/Ongoing Manager Assessment
  - Interaction Management
  - Situational Leadership
  - True Colors
- Participate in a workshop designed to build and enhance teamwork skills.
- Seek an assignment to work with a group or task force that includes people from diverse interest groups or departments within your organization.

Step 1: Development of Goals / Objectives (Required)

At the beginning of the performance cycle, individual job objectives and development goals will be established by the employee with feedback from the supervisor as warranted. This is a high level list of four to five key areas in which the employee will focus his or her energy in accomplishing objectives; this is *not* a list of all the tasks the employee will complete. These objectives will be recorded on the Non-Instructional Leadership Performance Evaluation form found in ProGOE[2].

The following describes the steps that will help ensure a good start to the annual performance evaluation process.

Prepare

Review supporting documents to develop appropriate and relevant performance expectations for each employee.

A review of the following, prior to conducting the meeting, will help establish relevant goals and objectives for the upcoming year:
- District's strategic plan.
- Employee's current job description.
- Employee's previous performance evaluations.
- Previous dialogues with employee regarding his/her objectives.
- Employee's workload and current results.
- Team's workload and current results.

Developing SMART Objectives

One way to develop well-written objectives is to use the SMART approach. This acronym stands for the following:

> **S**pecific
> **M**easurable
> **A**chievable
> **R**elevant
> **T**ime bound

Developing specific, measurable objectives requires time, orderly thinking, and a clear picture of the results expected from program activities. The more specific the objectives are, the easier it will be to demonstrate success.

Specific —What exactly are we going to do for whom?

The "specific" part of an objective tells us what will change for whom in concrete terms. It identifies the population or setting and specific actions that will result. In some cases, it is appropriate to indicate *how* the change will be implemented (e.g., through training). *Coordinate*, *partner*, *support*, *facilitate*, and *enhance* are not good verbs to use in objectives, because they are vague and difficult to measure. On the other hand, verbs such as *provide*, *train, publish, increase, decrease, schedule,* or *purchase* indicate clearly what will be done.

Measurable —Is it quantifiable and can we measure it?

"Measurable" implies the ability to count or otherwise quantify an activity or its results. It also means that the source of and mechanism for collecting measurement data are identified, and that collection of these data is feasible for your program or partners. Another important consideration is whether change can be measured in a meaningful and interpretable way given the accuracy of the measurement tool and method.

Achievable — Can it be done in the proposed time frame with the resources and support available?

The objective must be feasible within the available resources, appropriately limited in scope, and within the individual's control and influence.

Relevant —Will this objective have an effect on the desired goal or strategy?

"Relevant" relates to the relationship between the objective and the overall goals of the department, division, and district. It should be evident that accomplishment of an objective will have a positive impact on strategic intent.

Time bound —By when will this objective be accomplished?

A specified and reasonable time frame should be incorporated into the objective statement. This should take into consideration the environment in which the change must be achieved, the scope of the change expected, and how it fits into the overall plan. It could be indicated as "By December, the program will…" or "Within six months of receiving the grant..."

Recording Established Objectives

The Non-Instructional Leadership Staff Performance Evaluation form, found in ProGOE[2], is used to record the agreed-upon objectives for the upcoming review cycle. Should the work situation change, the employee and supervisor can reconvene to discuss the continuing relevance of the established objectives and to make any adjustments during the cycle as needed.

Step 2: Mid-Year Conference (Required)

Review Expectations and Adjust

Annual Evaluations are much easier, and much more relaxed, if the supervisor and employee meet individually and regularly for one-on-one discussions throughout the year.

The purpose of the Mid-Year Conference is to give the employee feedback on the "How" of the job—the Job Dimensions. Not only is this an opportunity for the employee to receive valuable performance feedback, but this also provides the supervisor with an opportunity to identify needs within the department/section. The Mid-Year Conference will help ensure that there are no surprises once it's time to complete the annual performance evaluation in later in the year.

Step 3: Self-Evaluation (Optional)

The Employee Self-Evaluation

The employee being reviewed is provided an opportunity to provide input into his or her own annual performance. This is accomplished through the completion a self- evaluation, also located within the ProGOE[2] system.

For each Job Dimension, the employee will select a performance level based on the rubric definitions provided in each Job Dimension section of this guide. The employee is encouraged to add overall comments to further explain performance where warranted. If the Self-Evaluation is used, the employee must "share & finalize" the document within ProGOE[2] before the supervisor will be able to view.   As this is an optional step, the supervisor may still complete the annual evaluation without this component.

Step 4: Interim Evaluations (As Needed)

Professional Development Assistance Plan (PDAP)

If the supervisor believes the employee's performance in any of the six dimension areas falls in either the Unsatisfactory or Needs Improvement category, the supervisor will do the following:

- Supervisor will conduct an <u>interim evaluation</u> in all six dimensions. The required employee conference will focus on the interim evaluation and performance dimension(s) that are below an effective level.

- A written Professional Development Assistance Plan (PDAP) will be developed with the employee to correct said deficiencies in the dimension(s); and

- The required employee conference will focus on recommendations for improvement with respect to the deficient area(s); and

- A specific and reasonable prescribed period of time will be given to correct said deficiencies along with a timeline of future conferences with the employee to discuss the employee's performance. These conferences should be conducted to provide additional opportunities for feedback and improvement. Additional observations will help support the decision-making process about renewal of the employee's contract for the next year.

- Supervisor and employee will sign and date the PDAP (blue ink) at the first conference meeting. All subsequent conference meetings will require the supervisor's and employee's initials along with the date. At completion of the PDAP, the supervisor and employee will sign and date in blue ink and close the PDAP. The PDAP is a working document and kept by the supervisor with copies provided to the employee. The PDAP will be sent to HR along with the interim and annual evaluation at the end of the process. If the supervisor determines the PDAP needs to remain "open" after completion of the annual evaluation and continue on into the next evaluation period, this is acceptable.

The supervisor is ultimately responsible for the interim evaluation, PDAP, observations and final evaluation process. However, good communication must occur between the supervisor and employee so that conflicting messages and focus on growth is consistent.

The supervisor should always be aware of the timeline and outcome of the conference(s) in order for there to be no surprises to the employee upon review of the final evaluation.

Step 5: Annual Performance Evaluation (Required)

Once the evaluation period cycle is complete, it is time to complete the annual performance evaluation. The ProGOE[2] system is used to complete and record the annual performance evaluation.

In order to complete the annual evaluation, supervisors should use the following tools and processes:

- The Employee Self-Evaluation (if completed)
- Supervisor notes
- Employee job description

Supervisor Notes and Observations

Throughout the annual performance evaluation cycle, the supervisor should keep notes on the employee's performance. These can be e-mails and memos received from others about the employee, the supervisor's own notes on specific accomplishments or issues as they occurred, and any notes taken as part of ongoing, informal discussions.

Completing the Evaluation Form

The supervisor, using the employee's optional self-evaluation and the supervisor's own observations, selects one of the following performance levels based on the defined rubrics:

Highly Effective	Effective	Needs Improvement/Developing	Unsatisfactory
Consistently exceeds expectations in the key elements and behavioral evidence of this job dimension.	Demonstrates strong performance in most key elements and behavioral evidence of this job dimension.	Performs to minimum expectations in several of the key elements and behavioral evidence of this job dimension. Is Developing in the first year in position.	Fails to meet the minimum performance requirements in most key elements and behavioral evidence of this job dimension.

*For the first year in a job assignment, performance at this level should be designated as Developing.

Depending on the performance level selected for each dimension, all or a portion of that dimension's weight will be assigned. Once all dimensions are evaluated, the sum of the assigned weights will equal the overall performance rating. Note that these calculations will be handled automatically in ProGOE[2].

Administrative Requirements

All annual employee performance evaluations will be completed by the due date each year; "complete" includes delivery of the performance evaluation contents to the employee and forward the original with the employee's comments to the Employment Manager - Human Resources Services department <u>by the due date</u>. Please be sure that BOTH parties have signed in blue ink.

Conducting the Performance Discussion

The supervisor should schedule sufficient time to deliver and discuss the annual performance evaluation with the employee. In order to communicate to the employee the importance of the discussion, the supervisor should make arrangements for the meeting to be in private and uninterrupted except in the event of an emergency.

It is recommended that the dialog be open as each section of the evaluation is completed. The employee should be given ample time to react and respond to the evaluation contents. Once completed, the employee has the opportunity to include any written comments he or she feels is pertinent; then both the supervisor and the employee sign the evaluation and forward the original with the employee's comments to the Employment Manager - Human Resources Services department <u>by the due date</u>. Please be sure that BOTH parties have signed in blue ink.

The supervisor may initiate the new annual cycle for all Non-Instructional Leadership Staff during the same meeting by establishing objectives and discussing professional growth during the same meeting. Alternatively, the supervisor and employee may prefer to begin the new annual cycle at a separate meeting held at a later date.

APPENDIX A

Forms and Processes:

This section of the guide contains the specific form to be used as part of the Non-Instructional Leadership Staff Performance Evaluation System.

The ProGOE^2 System will be used for the following purposes:
- To collect the employees' goals and objectives development (if used)
- To record the mid-year conference (if used)
- As the Self-Evaluation form (if used) completed by the employee at the end of the review cycle.
- To record Interim Evaluations (as warranted)
- To record the formal performance results at the end of the review cycle.

The ProGOE^2 system may be found online at:

https://brevard.truenorthlogic.com

…or by navigating to the BPS homepage and selecting "ProGOE" from the "Staff" drop-down list.

Note that all employees will login to ProGOE^2 using their current BPS credentials. Ex:
Username: last.first@brevardschools.org
Password: P@ssw0rd1!

APPENDIX B
Glossary of Terms*

This appendix defines terms that are commonly used in the performance management process. Many of the terms are referenced in this guide; others have been included to enhance understanding of the process and the systems that support it.

Many of these terms have multiple meanings; this glossary attempts to restrict the definitions to the ones most indicative of a performance evaluation process.

Analogy: A comparison between two things, typically on the basis of their structure and for the purpose of explanation or clarification.

Associate: Anyone with whom one works; he or she could be a co-worker, peer, subordinate, superior, and/or customer.

Associate feedback: Observations from an associate about how an individual gets his or her job done, based on Job Dimensions identified for his or her position.

Behavioral: Involving, relating to, or emphasizing behavioral patterns; the way a person acts.

Best practices: A technique or methodology that through experience and research has proven to reliably lead to a desired outcome.

Coaching: A development process via which an individual is supported while achieving a specific personal or professional competence result or goal.

Collaboration: Working with others to achieve or do something, especially in an intellectual endeavor.

Compliance: The act or process of doing what you have been asked or ordered to do; the observance of federal law, state statute, and district policies and procedures.

Constraints: Something that limits or restricts someone or something; a control that limits or restricts one's actions or behavior.

Continuous improvement: An ongoing effort to improve products, services, and/or processes.

Customers – external: Customers that usually include students, parents, and the community.

Customers – internal: A customer who is directly connected to an organization and is usually (but not necessarily) internal to the organization. Internal customers are usually stakeholders, employees, or shareholders

Debrief: To carefully review upon completion of an activity.

Decisiveness: Able to make choices quickly and confidently; determining what the result of something will be.

Deliverable: To produce the designed, promised, or expected results.

Developing performance: A process supported by tools and resources to assist employees develop their performance.

Effective performance: Demonstrates strong performance in most key elements and behavioral evidence of a job dimension.

Empowerment: The process of which enables individuals/groups to fully access personal or collective power, authority and influence, and to employ that strength when engaging with other people, institutions, or society.

Ethical behavior: Acting in ways consistent with what society, individuals, and organizations typically think are good values.

Highly Effective performance: Consistently exceeds expectations in the key elements and behavioral evidence of a job dimension.

Individual professional growth plan: When individual team members identify strengths and areas for development through self-evaluation and feedback.

Job dimension: Includes the key competencies, including personality traits, that are held to be essential to performance of a job in order to meet objectives; the "how" of getting a job done.

Meeting management: The skills and techniques used to conduct a meeting that are most likely to ensure accomplishment of the meeting's objectives.

Mentor: Someone who teaches or gives help and advice to a less experienced and often younger person.

Mission Statement: A mission statement is a statement of the purpose of a company, organization, or person; its reason for existing that guides the actions of the organization and provides the framework within which its strategies are formulated.

Needs Improvement performance: Performs to minimum expectations in several of the key elements and behavioral evidence of a job dimension. For the first year in a job assignment, performance at this level should be designated as Developing.

Non-Bargaining Support Staff Performance Evaluation Form: The online, interactive form that is used to complete the annual and mid-year evaluations, as well as for completion of the self-evaluation process.

Non-verbal communications: Communication through sending and receiving wordless (mostly visual) cues between people.

Operational values: Core values are what support the vision, shape the culture, and reflect what the organization values; they are the essence of its identity – the principles, beliefs, or philosophy of values.

Organizational beliefs: Assumptions and convictions that are held to be true, by an individual or a group, regarding concepts, events, people, and things.

Performance evaluation cycle: The process through time which assesses, documents, and provides feedback on the performance of an individual.

Performance evaluation: The documented results of completing the performance evaluation cycle.

Performance management: An ongoing process of communication between a supervisor and an employee that occurs throughout the year, in support of accomplishing the strategic objectives of the organization.

Progress meeting: Periodic meetings of the performance evaluation cycle during which the supervisor and employee discuss progress and adjust objectives as needed.

Qualitative feedback: Qualitative feedback is a body of observations and responses to one's work or performance that is based on comparisons and descriptions of characteristics in a non-numerical manner; allows those giving the feedback to be more specific about what they do or do not like and what they believe could be improved.

Quantitative feedback: Quantitative feedback is an evaluation performed on the basis of measurable outcomes and metrics, providing concrete information about employee and performance which can be used as part of a regular assessment plan or in the development of new goals.

Clarifying Questions: Simple questions of fact that clarify a situation.

Questions – closed-ended: A question that can be answered with either a single word or a short phrase.

Questions – open-ended: Deliberately seek longer answers and ask for thinking, reflection, opinion, and/or feelings.

Questions – rhetorical: Asked when the questioner himself knows the answer already or an answer is not actually demanded, therefore an answer is not expected.

Rubric: A guide or description defining specific criteria for assigning a level of performance to an employee.

Self-Evaluation: An employee's own judgment about the quality of his or her work, or the process of judging your own work.

SMART objectives: An acronym that defines criteria to guide the setting of objectives.

Strategic plan: A document used to communicate with the organization the organization's goals, the actions needed to achieve those goals, and all of the other critical elements developed during the planning exercise.

Student achievement: Student achievement is a student doing well academically, obtaining life skills, and giving back to the community.

Systems support: Software and other systems that provide a needed infrastructure for a process.

Tactical: Of or relating to small-scale actions serving a larger purpose.

Unsatisfactory performance: Fails to meet the minimum performance requirements in most key elements and behavioral evidence of a job dimension.

Vision: An aspirational description of what an organization would like to achieve or accomplish in the mid-term or long-term future. It is intended to serve as a clear guide for choosing current and future courses of action. See also mission statement.

*Definitions are derived from various sources, including the *Oxford Dictionary,* the *Merriam-Webster Dictionary,* Wikipedia, the *Business Dictionary,* and from individual experience.